1990 NOVA SCOTIA TOURISM STATISTICAL REVIEW

Research Section

Nova Scotia Department of
Tourism and Culture

FORWARD

The 1990 Nova Scotia Tourism Statistical Review contains the main industry statistics generated annually by the Nova Scotia Department of Tourism and Culture. This document represents a consolidation of several reports which, in previous years, were released under separate covers. It is our hope that this new format will help users more readily access a variety of tourism data. The primary purpose of The Review is to present the major indicators of tourism industry performance for 1990, using 1989 as a basis for comparison. Where appropriate information is available, general trend information has also been included.

The Review is comprised of four main parts. First, the **Tourism Economic Impact Report** presents estimates of the value of the tourism industry to Nova Scotia.

The **Visitor Volume Report**, the second component of the review, documents the number of visitors entering Nova Scotia by road and air between Mid - May and the end of October.

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The **Campground Report** includes an inventory of municipal and private campgrounds in Nova Scotia as well sales data and occupancy rates.

For further information about any of the statistics contained in this review, please contact the Research Section at (902) 424-4225.

1990 NOVA SCOTIA TOURISM ECONOMIC IMPACT REPORT

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Nova Scotia Department

of Tourism and Culture

TABLE OF CONTENTS

I. TOURISM ECONOMIC IMPACT REPORT

TOTAL TOURISM RECEIPTS 1
TOURISM RECEIPTS BY REGION 3
TAX REVENUE 5
EMPLOYMENT 6
PAYROLL 7

APPENDIX: TOURISM REGIONS OF NOVA SCOTIA 8

II. VISITOR VOLUME REPORT

VISITOR VOLUME OVERVIEW 1
- Visitor Origin 2
- Mode of Travel 4
- Point of Entry 6

ROAD VISITOR VOLUME
- Overview of Road Visitation 7
- Auto Visitors
  - Auto Visitor Seasonal Patterns 10
  - Auto Visitor Origin 12
  - Auto Visitor Point of Entry 14
- Recreational Vehicle Visitors
  - Recreational Vehicle Visitor Seasonal Patterns 16
  - Recreational Vehicle Visitor Origin 18
  - Recreational Vehicle Visitor Point of Entry 20
- Motorcoach Visitors
  - Motorcoach Visitor Seasonal Patterns 22
  - Motorcoach Visitor Origin 24
  - Motorcoach Visitor Point of Entry 26

AIR VISITOR VOLUME
- Air Visitor Origin 28
- Air Visitor Trip Purpose 30
- Air Visitor Length of Stay 31
- Air Visitor Party Size 32

APPENDIX: DEFINITIONS AND TERMS 33

III. FIXED-ROOF ACCOMMODATION REPORT

1990 ACCOMMODATION SUPPLY
- Overview of Fixed-Roof Accommodation Supply 1
- Supply by Type of Fixed-Roof Accommodation 3
- Supply by Size of Fixed-Roof Accommodation 6
- Fixed-Roof Accommodation Supply by Region 7
- Fixed-Roof Accommodation Supply by County 11

1990 ACCOMMODATION DEMAND
- Overview of Fixed-Roof Accommodation Demand 12
- Seasonal Patterns in Demand 14
- Demand by Type of Fixed-Roof Accommodation 16
- Fixed-Roof Accommodation Demand by Region 18

APPENDIX A: DEFINITIONS & TERMS 20
APPENDIX B: TOURISM REGIONS OF NOVA SCOTIA 21

IV. CAMPGROUND REPORT

1990 CAMPGROUND SUPPLY
- Overview of Campground Supply 1
- Campground Supply by Region 3
- Campground Supply by County 6

1990 CAMPGROUND DEMAND
- Overview of Campground Demand 7
- Seasonal Patterns in Demand 8
- Demand by Type of Camper 10
- Short-Term Camper Origin 11
- Campground Demand by Region 14

APPENDIX A: DEFINITIONS & TERMS 16
APPENDIX B: TOURISM REGIONS OF NOVA SCOTIA 18

FORWARD

Tourism, as a major force in both the national and provincial economies, generates hundreds of millions of dollars in sales for Nova Scotian businesses, and tens of thousands of jobs for Nova Scotians. In addition, both the provincial government and municipal governments receive tens of millions of dollars in tax revenues from tourism-related expenditures and business every year. Furthermore, these vital benefits are felt in virtually every area of the province and span a range of industries almost as broad as the economy itself.

This document quantifies these benefits by presenting estimates of the economic impact of the tourism industry in Nova Scotia. It includes estimates of total tourism receipts segmented by type, expenditure, and region. It also presents estimates of municipal and provincial taxes generated, the number of jobs created, and the payroll paid by the tourism industry.

This Tourism Economic Impact Report is one of four reports which collectively form the 1990 Tourism Statistical Review. Other sections of the 1990 Tourism Statistical Review which are also available under separate cover include the Visitor Volume Report, the Fixed-Roof Accommodation Report, and the Campground Report.

Note: Estimates of the distribution of economic impacts across the tourism regions of Nova Scotia are based on a model devised prior to 1980. Many changes have occurred within the tourism industry since that time. As a result, it has been recognized that this model must be reworked and an updated system for determining economic impacts within each region is currently under development. Readers are therefore advised to exercise caution in interpreting regional break-outs of provincial totals and to expect significant revisions in subsequent Tourism Statistical Reviews.

TABLE OF CONTENTS

TOTAL TOURISM RECEIPTS 1

TOURISM RECEIPTS BY REGION 3

TAX REVENUE 5

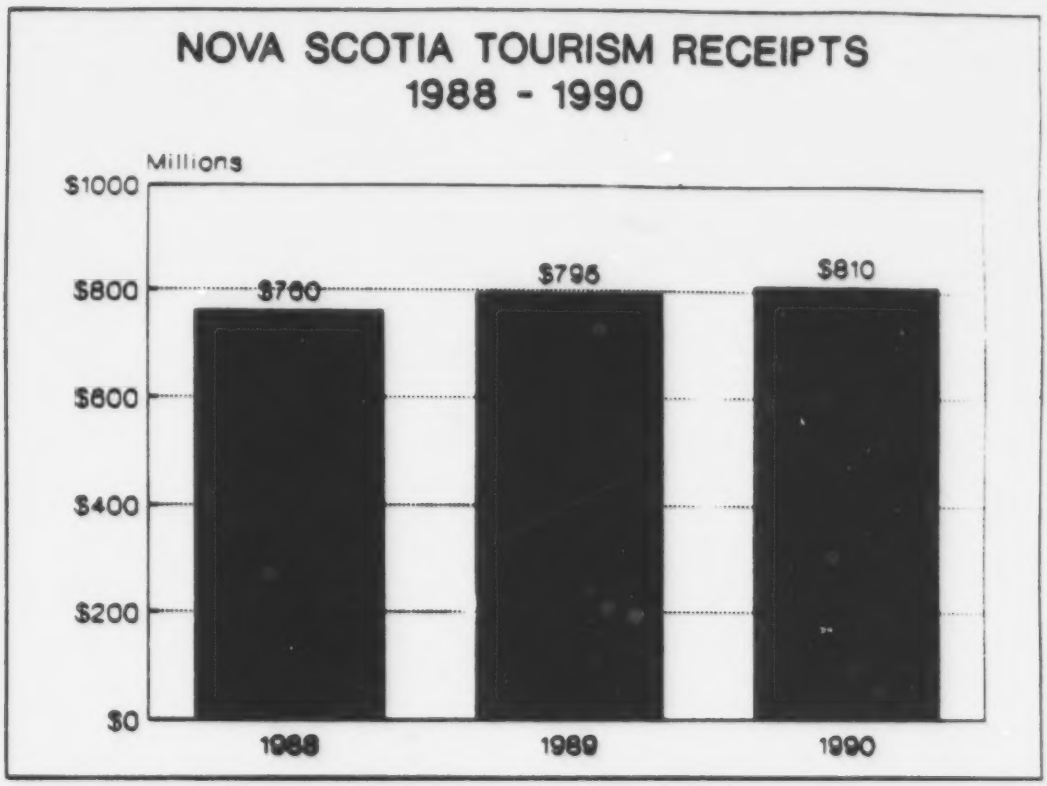
EMPLOYMENT 6

PAYROLL 7

APPENDIX: TOURISM REGIONS OF NOVA SCOTIA 8

TOTAL TOURISM RECEIPTS

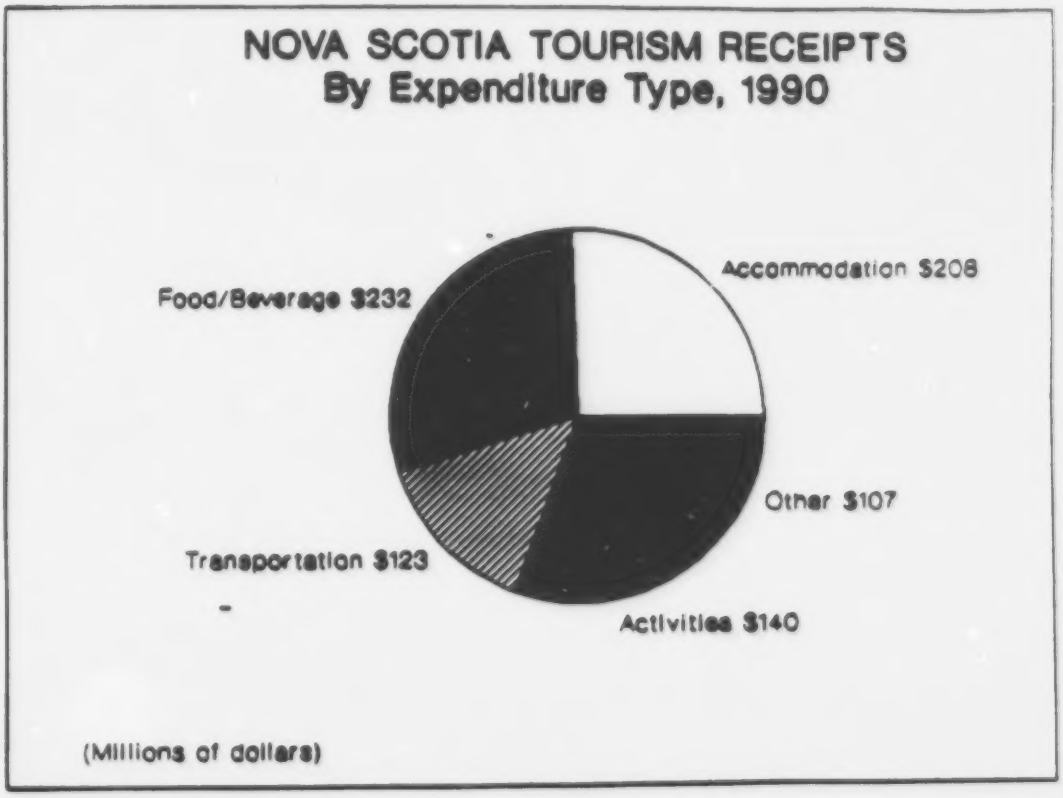
Tourism continues to be one of the most important sectors of Nova Scotia's economy in terms of revenues generated. During 1990 the tourism industry generated an estimated $810 million in receipts in Nova Scotia. This represents an increase of 1.9% over 1989, when an estimated $795 million in revenues were taken in.



The tourism industry benefited a broad spectrum of businesses in Nova Scotia in 1990. The largest single beneficiary was the food and beverage sector which accounts for just over a quarter of all the province's tourism receipts at an estimated $232 million. The accommodations sector is close behind at $208 million, accounting for a quarter of all travel dollars spent in Nova Scotia. The industry also generated $140 million in visitor spending on activities and a further $123 million in transportation expenditures during 1990. An estimated $107 million was spent on other goods and services.

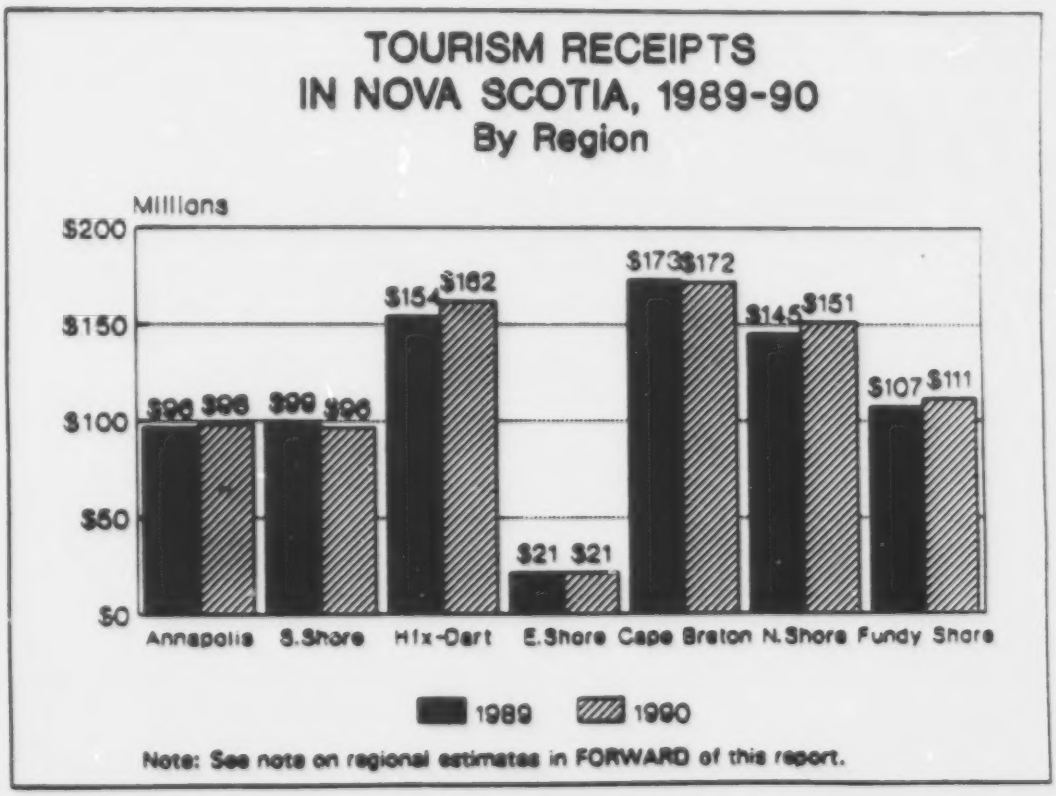
Table 1
Tourism Receipts in Nova Scotia
by Expenditure Category, 1990

Type of Expenditure	Amount (Millions)	% of Total
Food and beverages	$ 232	29%
Accommodation	$ 208	26%
Activities	$ 140	17%
Transportation	$ 123	15%
Other	$ 107	13%
Total	$ 810	100%



TOURISM RECEIPTS BY REGION

Tourism has a major impact throughout all regions of Nova Scotia. Cape Breton accounts for the largest proportion of the province's tourism receipts, having generated an estimated $172 million or about 21% of the provincial total in 1990. The Halifax - Dartmouth region was the second largest in 1990 having generated some $162 million in receipts, or about 20% of the provincial total. The Northumberland Shore is not far behind, with $151 million in tourism receipts for the year, or about 19% of the total. The Fundy Shore accounted for about 14% of the provinces tourism receipts at $111 million, making it the fourth largest recipient of tourism expenditures in Nova Scotia. The Annapolis Valley and the South Shore regions were virtually the same in terms of receipts in 1990, accounting for $98 million and $96 million respectively. Each of these regions accounted for about 12% of the tourism dollars spent in the province. An estimated $21 million, or about 3% of the provincial total was spent in the Eastern Shore region.



Note: See note on regional estimates in FORWARD of this report.

Relative to the previous year, the Halifax-Dartmouth tourism region experienced the largest increase in tourism expenditures in 1990, with a 5.2% increase over 1989 levels. The Northumberland Shore experienced an estimated 4.1% increase in tourism receipts while in the Fundy Shore region, receipts increased by 3.7%.

Table 2
Tourism Receipts in Nova Scotia
by Region, 1989-90

	1990		1989		
	Amount (Millions)	% of Total	Amount (Millions)	% of Total	% Change
Cape Breton	173	21%	172	22%	- 0.6%
Halifax-Dartmouth	154	20%	162	19%	+ 5.2%
Northumberland Shore	145	19%	151	18%	+ 4.1%
Fundy Shore	107	14%	111	14%	+ 3.7%
Annapolis Valley	96	12%	98	12%	+ 2.1%
South Shore	99	12%	96	12%	- 3.0%
Eastern Shore	21	3%	21	3%	0.0%
Nova Scotia	$ 810	100%	$ 795	100%	+ 1.9%

Note: 1. Columns may not exactly equal totals due to rounding.
2. See note on regional estimates in FORWARD of this report.

The Annapolis Valley region experienced a increase of 2.1% in tourism receipts, while in the Eastern Shore area, there was no change in expenditure levels. The Cape Breton and South Shore regions incurred decreases of 0.6% and 3.0%, respectively.

TAX REVENUES

In 1990, the tourism industry generated an estimated $61 million in provincial tax revenues for the Province of Nova Scotia. In addition, total municipal taxes were estimated to be $27 million, for a total of $88 million in tax receipts. Compared to 1989, this represents an overall increase of 1.1% in tax receipts accruing from tourism.

Table 3
Estimated Tourism Industry Taxation
by Region

	1990			1989	
	Provincial ($Millions)	Municipal ($Millions)	Total ($Millions)	Total ($Millions)	% Change
Cape Breton	$ 14	$ 6	$ 20	$ 20	0.0%
Halifax-Dartmouth	12	6	18	17	+ 5.9%
Northumberland Shore	11	5	16	16	0.0%
Fundy Shore	8	3	11	11	0.0%
Annapolis Valley	7	3	10	10	0.0%
South Shore	7	3	10	11	- 9.1%
Eastern Shore	NA *	NA *	2	2	0.0%
Nova Scotia	$ 61	$ 27	$ 88	$ 87	+ 1.1%

Note: 1. No separation of municipal and provincial tax receipts is available for the Eastern Shore region.
2. Columns may not exactly equal totals due to rounding.
3. See note on regional estimates in FORWARD of this report.

Cape Breton accounted for the greatest amount in combined municipal and provincial taxes at about $20 million and the Halifax-Dartmouth region was close behind at an estimated $18 million. The tourism industry in the Northumberland Shore region generated an estimated $16 million in municipal and provincial taxes in 1990. Tax receipts were essentially similar in the South Shore ($11 million), Fundy Shore ($11 million) and Annapolis Valley ($10 million) regions.

EMPLOYMENT

Tourism remained an important employer in the Nova Scotia economy, although it is estimated that the number of jobs declined 3.7% from 1989 levels. The industry provided approximately 33,700 full-time and part-time jobs, including seasonal and indirect employment, during 1990.

Tourism-related employment is distributed widely across the province. In terms of numbers of part-time or full-time employment, the Halifax-Dartmouth and Cape Breton regions were the largest, each accounting for an estimated 7,100 jobs in 1990. In the Northumberland Shore region some 6,300 jobs depended either directly or indirectly on tourism, while in the Fundy Shore region, tourism generated an estimated 4,400 jobs. Tourism-related employment levels were similar in the South Shore (4,000 jobs) and the South Shore regions (3,900 jobs) while approximately 900 jobs were located in the Eastern Shore region.

Relative to last year, almost all regions of the province experienced a decline in the number of tourism-related jobs in 1990. The South Shore and Cape Breton regions incurred the largest declines of 9.1% and 6.6% respectively. Tourism-related employment in the Annapolis Valley region declined by 2.5% from 1989 levels while in the Fundy Shore region, the estimated number of tourism-related jobs decreased by 2.2%. On a proportional basis, the decline in tourism-related employment was less serious in Northumberland Shore and Halifax-Dartmouth regions where the number of jobs decreased by 1.6% and 1.4% respectively.

Table 4
Estimated Tourism Industry Jobs
by Region

	1990			1989	
	Direct	Spinoff	Total	Total	% Change
Halifax-Dartmouth	4,600	2,500	7,100	7,200	- 1.4%
Cape Breton	4,600	2,500	7,100	7,600	- 6.6%
Northumberland Shore	4,000	2,300	6,300	6,400	- 1.6%
Fundy Shore	2,900	1,500	4,400	4,500	- 2.2%
Annapolis Valley	2,500	1,400	3,900	4,000	- 2.5%
South Shore	2,500	1,500	4,000	4,400	- 9.1%
Eastern Shore	600	300	900	900	0.0%
Nova Scotia	21,700	12,000	33,700	35,000	- 3.7%

Note: See note on regional estimates in FORWARD of this report.

PAYROLL

In 1990 the estimated tourism payroll in Nova Scotia increased slightly. During this time, the total payroll for jobs related either directly or indirectly to tourism increased by 1.6%, from $683 million in 1989 to $694 million.

The Cape Breton and Halifax-Dartmouth regions accounted for the largest payrolls of $146 million and $138 million respectively. The Northumberland Shore was nearly as large with an estimated $130 million in payroll in 1990. The Fundy Shore region ranked fourth in the province at $96 million. The Annapolis Valley ($84 million) and the South Shore ($82 million) were next in terms of payroll, while the Eastern Shore region had an estimated tourism-related payroll of $18 million in 1990.

Relative to 1989, most tourism regions in Nova Scotia experienced increases in tourism-related payrolls in 1990. The Halifax-Dartmouth region is estimated to have experienced the largest gain, with an increase of 5.1% over 1989 levels. Tourism-related payrolls in the Northumberland Shore and Fundy Shore regions are estimated to have increased by 4.7% and 4.1% respectively. The Annapolis Valley also posted a 2.2% gain. The tourism-related payroll in the Eastern Shore region is estimated to have remained unchanged from 1989, while the Cape Breton and South Shore regions saw declines of 2.7% and 3.2% respectively.

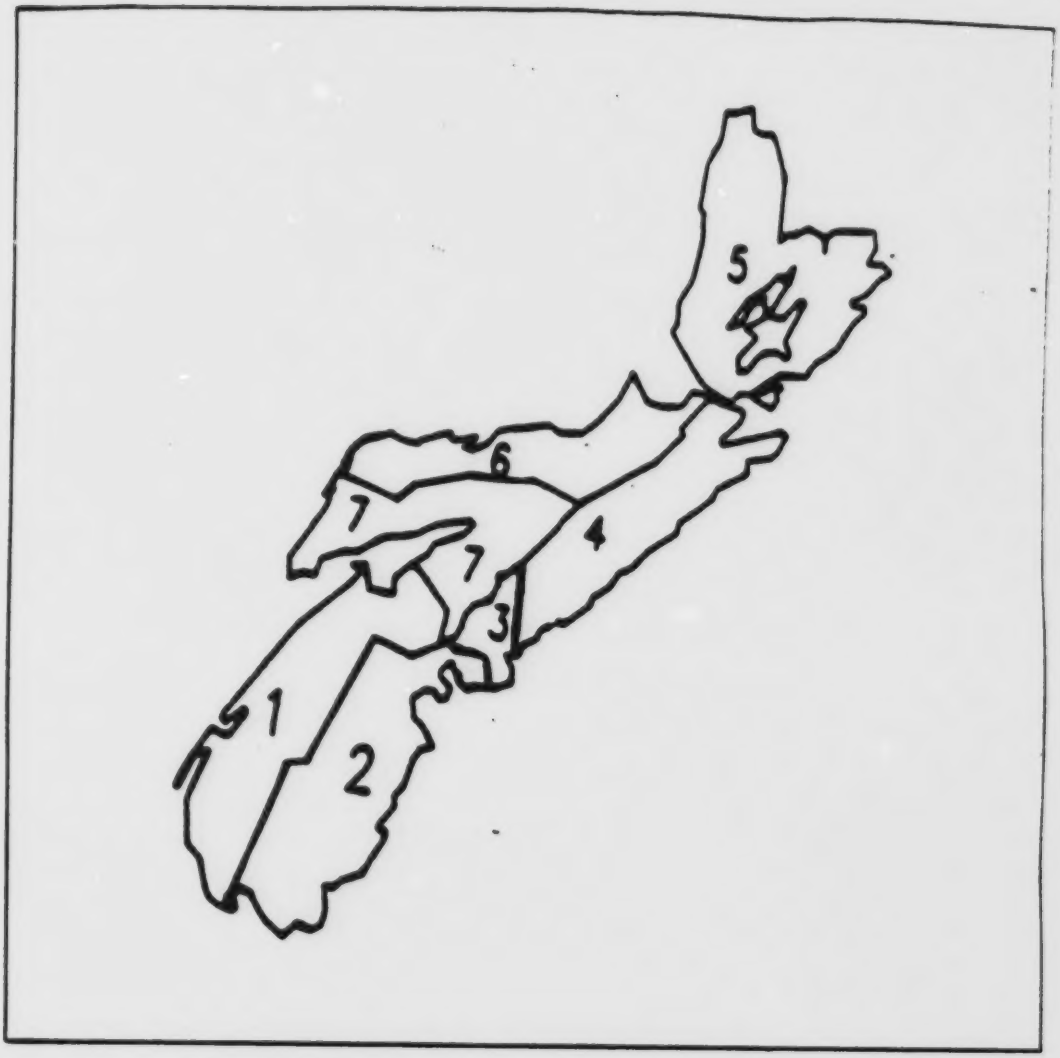
Table 5
Estimated Tourism Industry Payroll
by Tourism Region

	1990			1989	
	Direct ($ Millions)	Spinoff ($ Millions)	Total ($ Millions)	Total ($ Millions)	% Change
Cape Breton	$ 89	$ 57	$ 146	$ 150	- 2.7%
Halifax-Dartmouth	84	54	138	132	+ 5.1%
Northumberland Shore	79	51	130	124	+ 4.7%
Fundy Shore	58	38	96	92	+ 4.1%
Annapolis Valley	51	33	84	82	+ 2.2%
South Shore	50	32	82	85	- 3.2%
Eastern Shore	11	7	18	18	0.0%
Nova Scotia	$ 422	$ 272	$ 694	$ 683	+ 1.6%

Note: See note on regional estimates in FORWARD of this report.

APPENDIX:

TOURISM REGIONS OF NOVA SCOTIA



LEGEND:

1. Annapolis Valley
2. South Shore
3. Halifax-Dartmouth
4. Eastern Shore
5. Cape Breton
6. Northumberland Shore
7. Fundy Shore

Description of Tourism Regions of Nova Scotia

Annapolis Valley	Includes portion of Yarmouth County north of line between Yarmouth Ferry Terminal and junction of Yarmouth, Digby, Shelburne and Queens County lines; all of Annapolis and Kings Counties, and portion of Hants County roughly west of the Avon River.
South Shore	Includes portion of Yarmouth County southeast of line Between Yarmouth ferry terminal and junction of Yarmouth, Shelburne, Digby and Queens County lines; all of Queens and Lunenburg Counties; and portion of Halifax County roughly described as area west of Pockwock, south of Route 103 and west of route 306.
Halifax-Dartmouth	Includes Cities of Halifax and Dartmouth and (roughly) those areas contained by routes 253, 306, and 349 in the south: area bounded by Route 103 in the west, the Hants County and Colchester County lines in the north and the line between the mouth of Cole Harbour and Gays River in the east.
Eastern Shore	Includes portion of Halifax County east of line between mouth of Cole Harbour running northeast to Gays River, and all of Guysborough County.
Cape Breton	Includes all of Cape Breton Island.
Northumberland Shore	Includes portion of Cumberland and Colchester Counties north of the Trans Canada Highway to Wentworth, then area north of line between Wentworth and Mount Thom, all of Pictou and Antigonish Counties.
Fundy Shore	Includes portion of Cumberland and Colchester Counties south of Trans Canada Highway to Wentworth, remainder of Colchester County southwest of line between Wentworth and Mount Thom and portion of Hants County east of the Avon River.

1990 NOVA SCOTIA

VISITOR VOLUME

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TABLE OF CONTENTS

VISITOR VOLUME OVERVIEW 1
- Visitor Origin 2
- Mode of Travel 4
- Point of Entry 6

ROAD VISITOR VOLUME
- Overview of Road Visitation 7
- Auto Visitors
  - Auto Visitor Seasonal Patterns 10
  - Auto Visitor Origin 12
  - Auto Visitor Point of Entry 14
- Recreational Vehicle Visitors
  - Recreational Vehicle Visitor Seasonal Patterns 16
  - Recreational Vehicle Visitor Origin 18
  - Recreational Vehicle Visitor Point of Entry 20
- Motorcoach Visitors
  - Motorcoach Visitor Seasonal Patterns 22
  - Motorcoach Visitor Origin 24
  - Motorcoach Visitor Point of Entry 26

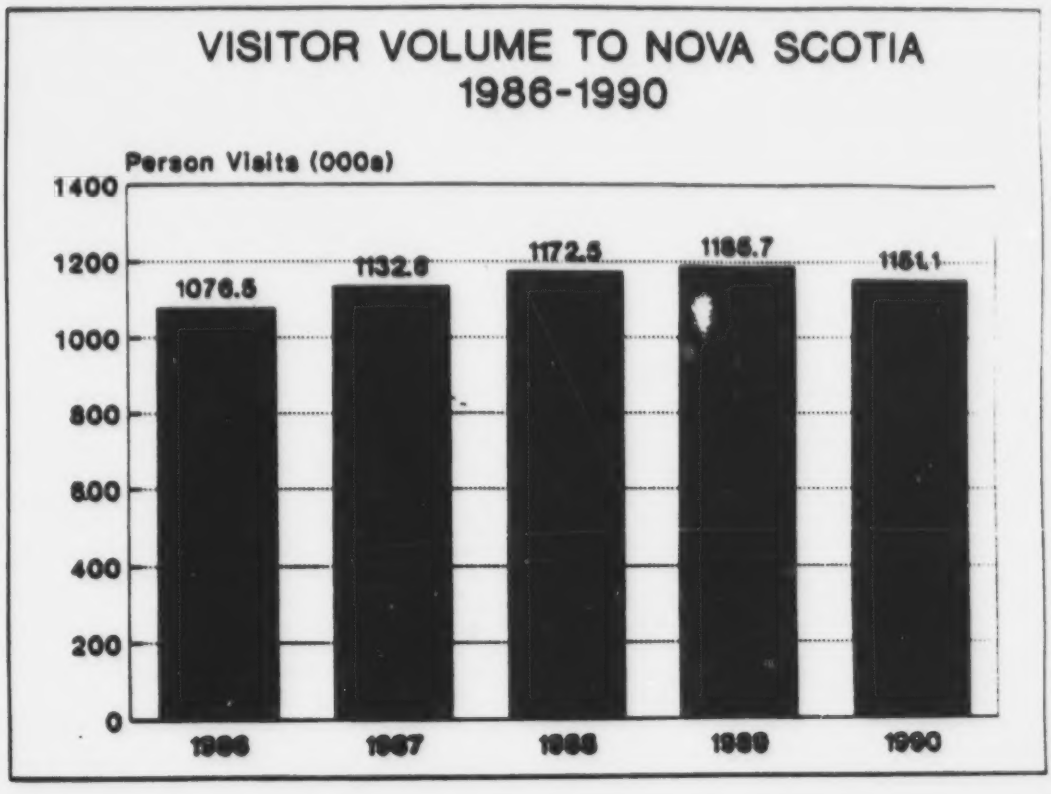
AIR VISITOR VOLUME
- Air Visitor Origin 28
- Air Visitor Trip Purpose 30
- Air Visitor Length of Stay 31
- Air Visitor Party Size 32

APPENDIX: DEFINITIONS AND TERMS 33

VISITOR VOLUME OVERVIEW

Approximately 1,151,100 overnight person visits were made to Nova Scotia between May 15 and October 31, 1990. This represents a 2.9% decline from the 1989 volume of 1,185,700.

Reviewing the previous five years, visitor volume to Nova Scotia grew a total of 6.9% or on average, 1.6% annually. Prior to the decline in 1990, between 1986 and 1989 visitor volume had been growing on average 3.3% annually.



Visitor Origin

In 1990, four of every ten visitors to Nova Scotia were from Atlantic Canada. Ontario accounted for another two of ten visitors to Nova Scotia, while only one of every twenty visitors originated from Quebec.

Approximately two of every ten visitors to Nova Scotia originated in the United States. The eastern seaboard states were the primary source of visitors to Nova Scotia, with three quarters of American travellers to Nova Scotia coming from one of these states. Nearly half of American visitors to Nova Scotia came from the New England states alone.

In 1990, 1.6% of visitors to Nova Scotia were from overseas countries.

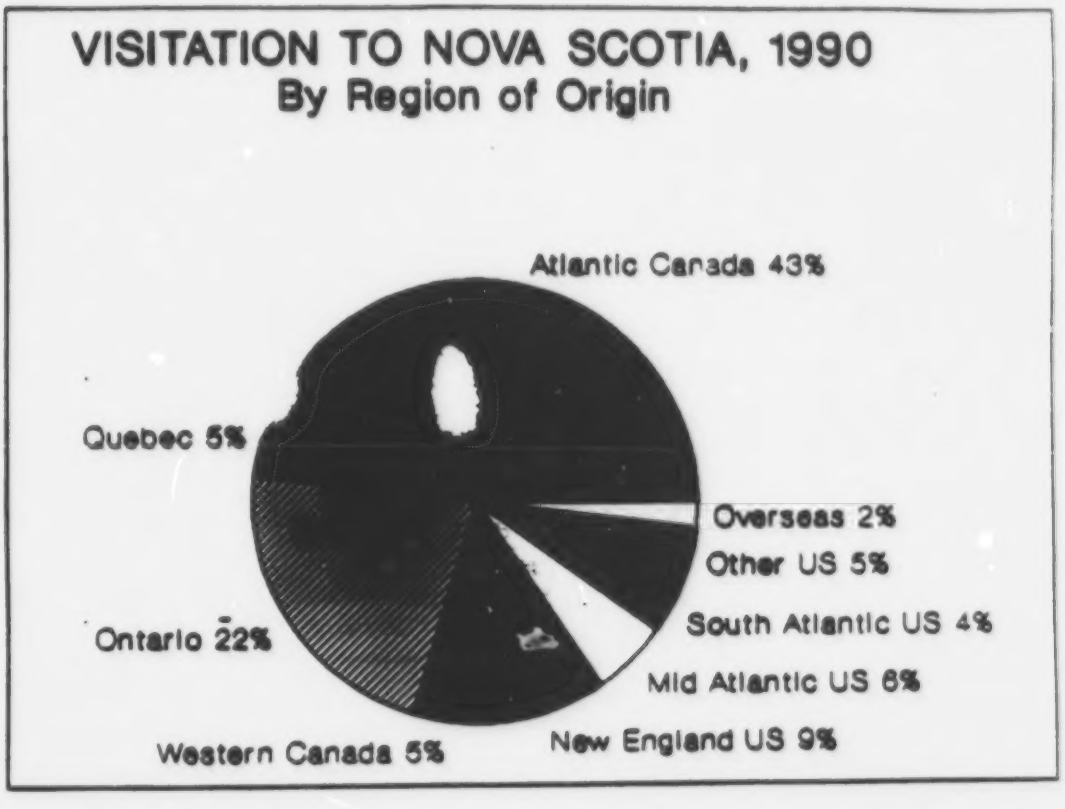


Table 1
Visitation to Nova Scotia
by Region of Origin, 1990

Region of Origin	1990 #	1990 %
Atlantic Canada	489,412	42.5%
Quebec	61,317	5.3%
Ontario	256,733	22.3%
Western Canada	57,625	5.0%
Total Canada	865,087	75.2%
New England	105,622	9.2%
Middle Atlantic	63,632	5.5%
East North Central	22,176	1.9%
West North Central	6,733	0.6%
South Atlantic	41,694	3.6%
East South Central	4,522	0.4%
West South Central	5,676	0.5%
Mountain	4,365	0.4%
Pacific	11,781	1.0%
Total United States	266,202	23.1%
United Kingdom	9,890	0.9%
Europe	5,375	0.5%
Other Overseas	3,010	0.3%
Total Offshore	18,275	1.6%
Total	1,151,100	100.0%

* Due to rounding, numbers may not always add to total.

Mode of Travel

The automobile remained the primary means of travel for visitors to travel to Nova Scotia, with seven of ten travellers using this mode. Automobile visitor volume grew a total of 5.6% between 1986 and 1990, slightly less than the overall visitor volume growth rate of 6.9% for same period.

The second most popular mode of travel was by air, which another two of ten travellers used to reach Nova Scotia. Air travel experienced a significant 41.4% growth over the same four year period, 1986 to 1990.

In contrast, there has been a substantial drop in the number of recreational vehicle and motorcoach visitors to Nova Scotia, with each mode experiencing approximately a 20% decline in volume between 1986 and 1990. As of 1990, recreational vehicles visitors accounted for 6.9% of total visitor volume while motorcoach visitors represented 3.9% of total visitor volume.

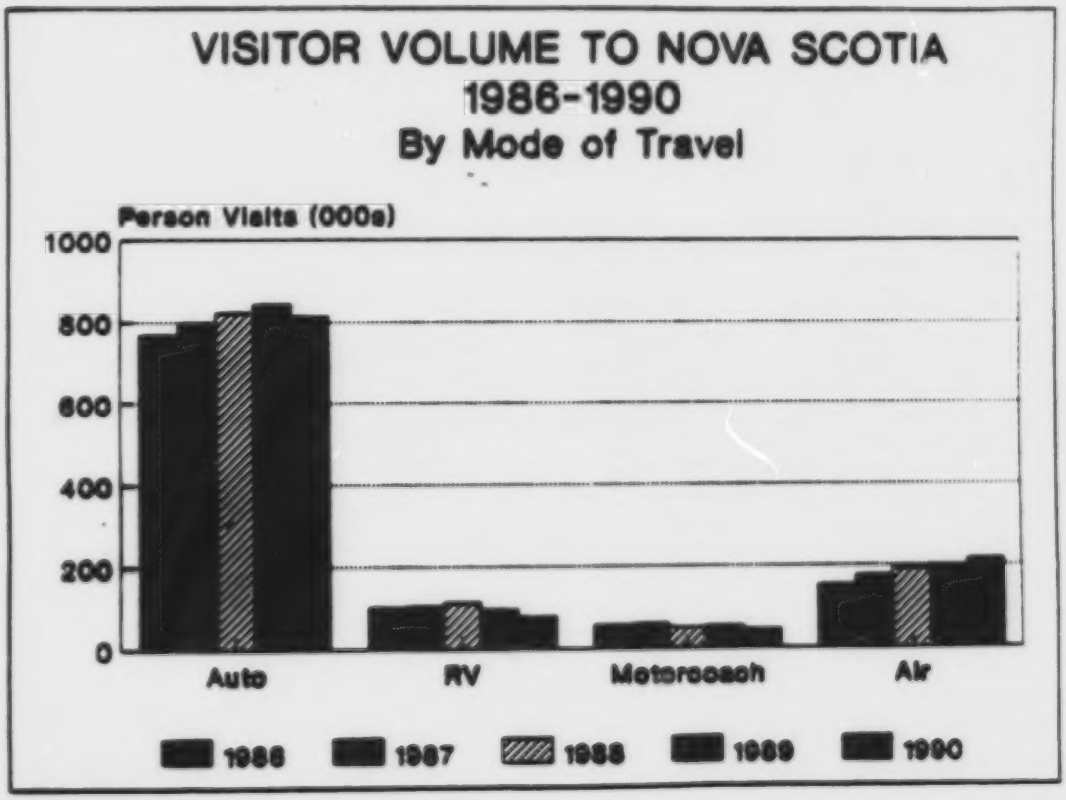


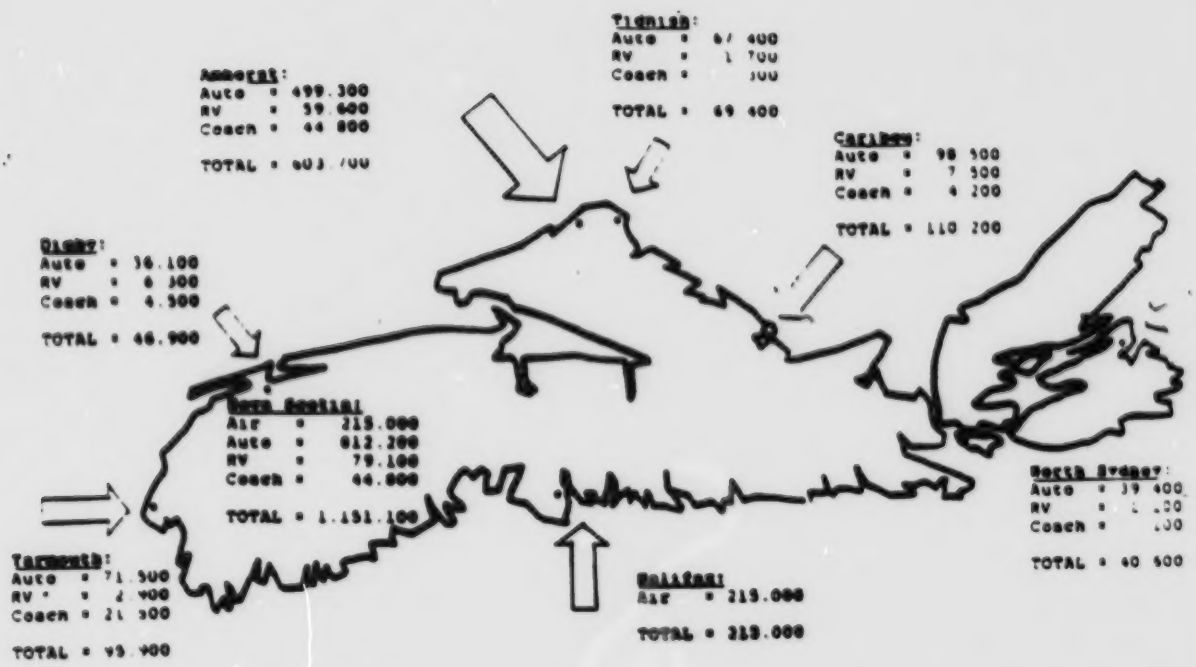
Table 2
Visitor Volume to Nova Scotia
by Mode of Travel, 1986-1990

	1986	1987	1988	1989	1990	% of 1990	1986-90 Trend
Auto	769,200	794,000	820,400	842,700	812,200	70.6%	5.6%
RV	99,600	104,600	112,100	94,700	79,100	6.9%	-20.6%
Mtrcoach	55,700	59,000	50,000	52,300	44,800	3.9%	-19.6%
Ttl Road	924,500	957,600	982,500	989,700	936,100	81.3%	1.3%
Air	152,000	175,000	190,000	196,000	215,000	18.7%	41.4%
Total	1,076,500	1,132,600	1,172,500	1,185,700	1,151,100	100.0%	6.9%

Point of Entry

The map below shows the volume of travellers to Nova Scotia by point of entry to Nova Scotia.

Fifty percent (50%) of travellers to Nova Scotia entered through Amherst in 1990. Another 19% of travellers entered the province at Halifax International Airport. Caribou, Yarmouth, and Tidnish each accounted for between 6 and 10% of total visitor volume while North Sydney and Digby each accounted for between 3 and 4%.



**TRAVELLERS TO NOVA SCOTIA.
BY ENTRY POINT - 1990**

ROAD VISITOR VOLUME

Overview of Road Visitation

Road travel, including visits by automobile, recreational vehicle, or motorcoach, accounted for over 80% of visitor volume to Nova Scotia between May 15 and October 31, 1990. Approximately 936,100 people entered Nova Scotia by one of these three modes of road travel. This represents a 5.4% decline in volume compared to 1989. This decline is due to a 3.6% decrease in automobile visitor volume and significant declines in recreational vehicle visitor volume (-16.5%) and motorcoach visitor volume (-14.3%) during 1990.

Five of ten travellers to Nova Scotia in 1990 came during the months of July and August. Another three in ten travellers came during the fall shoulder season of September/October.

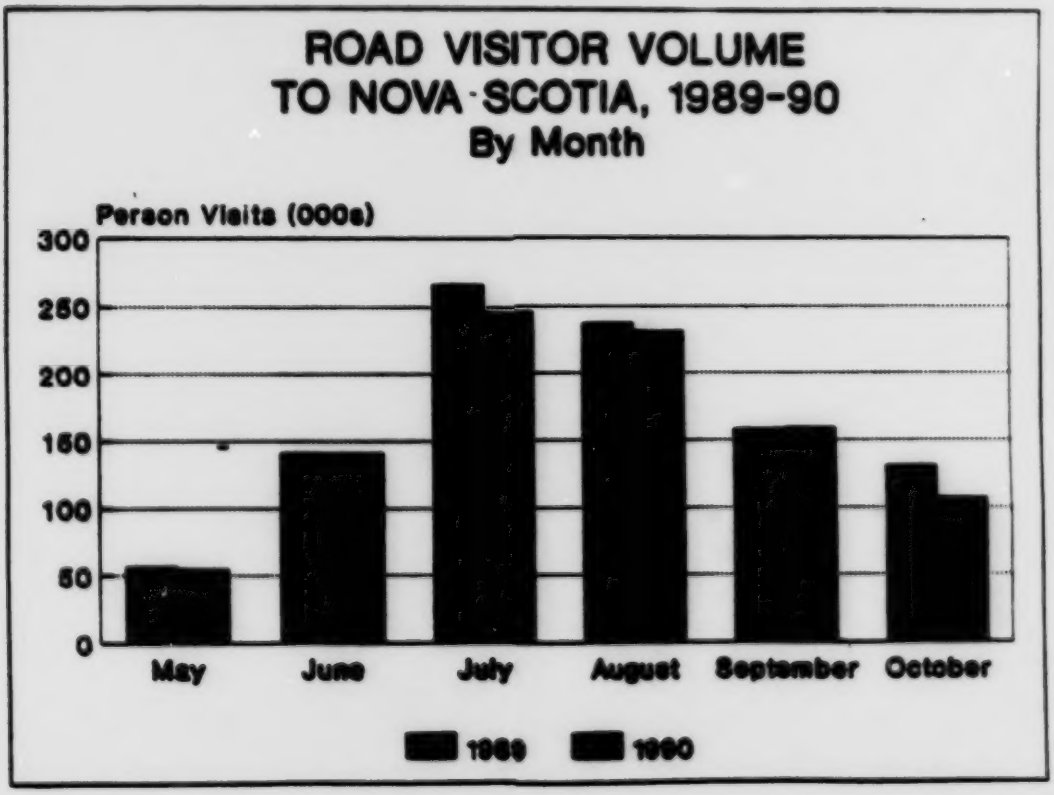


Table 3
Road Visitor Volume to Nova Scotia
by Month, 1986-1990

	1986	1987	1988	1989	1990	% of 1990	Five Yr Trend
May	51,300	53,000	55,600	56,700	54,300	5.8%	5.8%
June	133,800	136,600	139,800	140,700	140,500	15.0%	5.0%
July	251,300	262,100	273,800	266,200	245,500	26.2%	-2.3%
August	237,600	240,700	241,000	237,300	231,200	24.7%	-2.7%
Sept	150,100	158,000	166,000	158,000	158,200	16.9%	5.4%
Oct	100,500	107,100	106,300	130,800	106,400	11.4%	5.9%
Total	924,600	957,500	982,500	989,700	936,100	100.0%	1.2%

Of visitors entering Nova Scotia by road, five in every ten were from the other Atlantic Provinces, two in ten were from Ontario, and one in twenty from Quebec. Approximately 25% of road visitors originated in the United States, primarily from the eastern seaboard states.

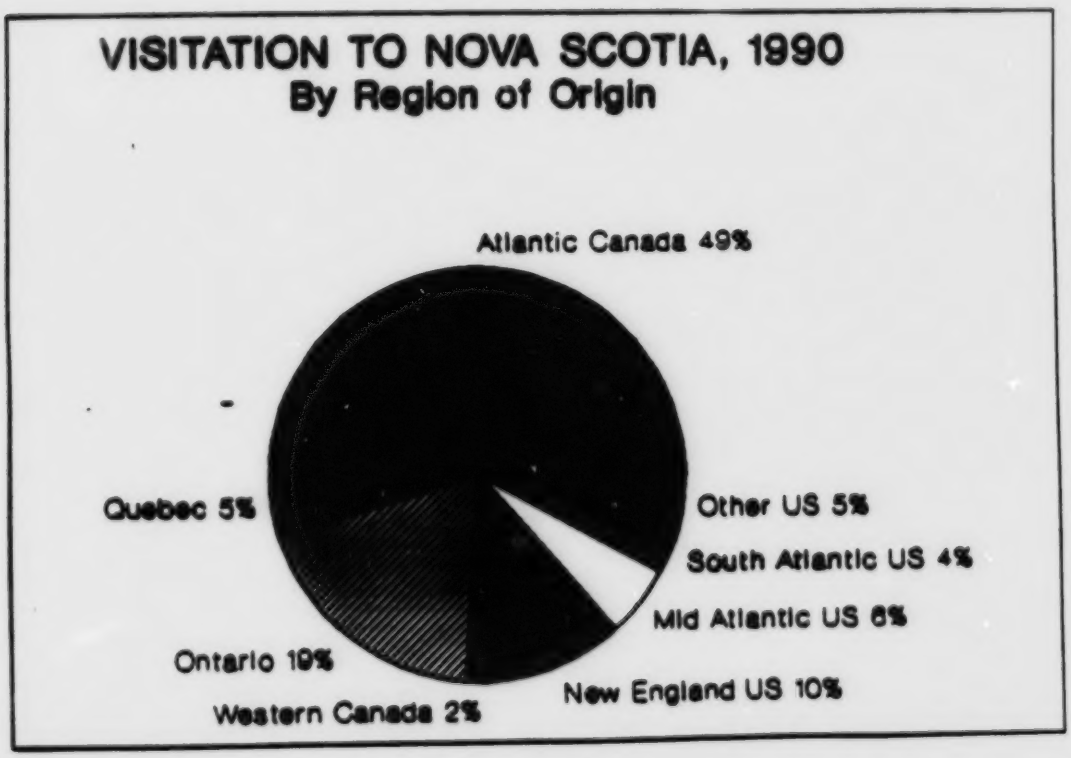


Table 4
Road Visitation to Nova Scotia
by Region of Origin, 1990

Region of Origin	1990 #	1990 %
Atlantic Canada	462,322	49.4%
Quebec	45,837	4.9%
Ontario	181,698	19.4%
Western Canada	20,860	2.2%
Total Canada	710,717	75.9%
New England	94,657	10.1%
Middle Atlantic	55,032	5.9%
East North Central	18,736	2.0%
West North Central	4,798	0.5%
South Atlantic	33,094	3.5%
East South Central	3,232	0.3%
West South Central	4,601	0.5%
Mountain	3,290	0.4%
Pacific	7,051	0.8%
Total United States	224,492	24.0%
Total	936,100	99.9%

Auto Visitors

The private automobile remained the dominant mode of travel for non-residents visiting Nova Scotia. During the May 15 to October 31, 1990 season, approximately seven of ten visitors came to Nova Scotia by automobile. However, the 812,200 overnight person visits made to Nova Scotia in 1990 by automobile represents a 3.6% decline from the 1989 level of 842,700 visits.

Auto Visitor Seasonal Patterns

July and August accounted for half the overnight automobile visitor volume between May 15 and October 31, 1990. Another three of ten automobile visitors to Nova Scotia came during the September/October shoulder season.

Although overall visitor volume declined 3.6% in 1990, volume during June, August, and September rose slightly above 1989 levels. The largest decline in volume was experienced in October, when auto visitor volume fell 18.6% below 1989 levels.

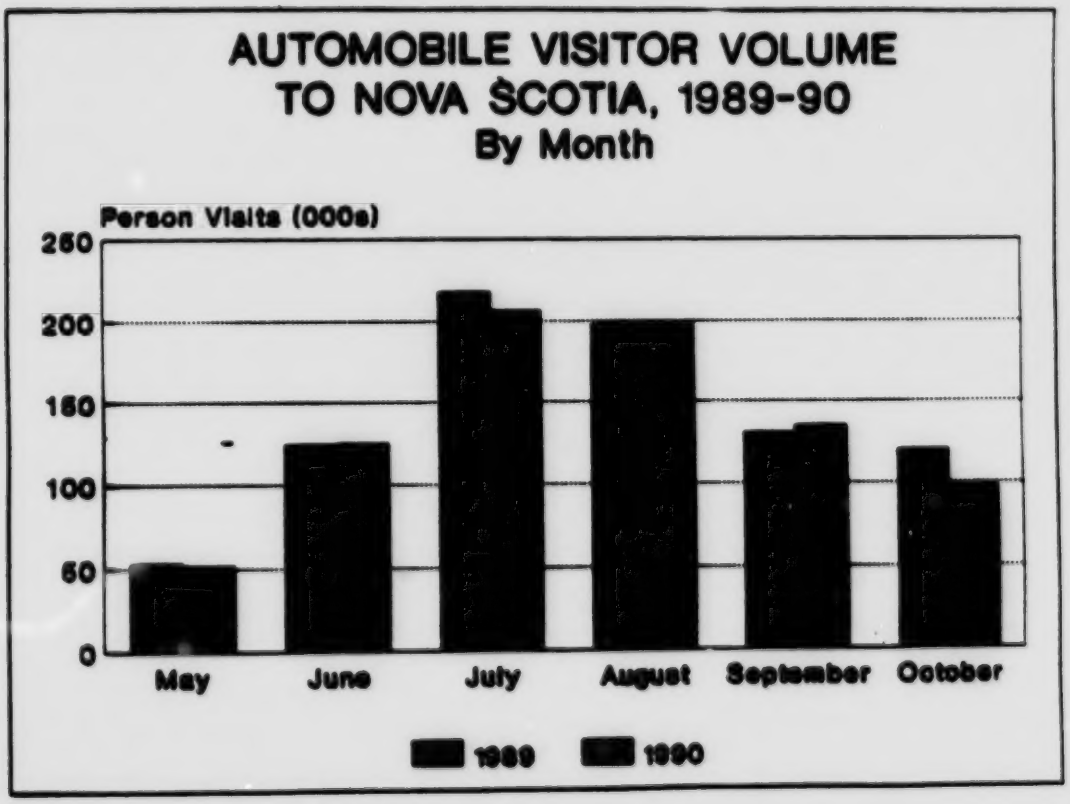


Table 5
Automobile Visitor Volume to Nova Scotia
by Month and Entry Point, 1989-90

	May	June	July	August	September	October	Total
Amherst	35,600	78,000	119,800	114,000	81,900	70,000	499,300
Tidnish	5,100	12,300	18,100	16,100	8,800	7,000	67,400
Caribou	4,700	13,200	27,400	25,900	17,200	10,200	98,600
N.Sydney	1,900	7,100	11,500	10,000	5,600	3,200	39,300
Yarmouth	2,200	9,300	19,900	21,400	14,100	4,600	71,500
Digby	1,500	4,900	9,100	10,700	7,200	2,700	36,100
1990 Ttl	51,000	124,800	205,800	198,100	134,800	97,700	812,200
% of Ttl	6.3%	15.4%	25.3%	24.4%	16.6%	12.0%	100.0%
1989 Ttl	52,800	123,900	217,500	198,000	130,400	120,100	842,700
% Change	-3.4%	0.7%	-5.4%	0.0%	0.3%	-18.7%	-3.6%

Auto Visitor Origin

The origin of 1990 overnight automobile visitors to Nova Scotia was very similar to 1989, with a 1% or less change in the proportion of visitors from any one region.

Atlantic Canada remained the largest generator of visitors to Nova Scotia, with 53.9% of overnight automobile visitors originating in New Brunswick, Prince Edward Island, or Newfoundland. One in five overnight automobile visitors came from Ontario, while Quebec accounted for one in twenty.

The key United States markets in 1990 remained the New England and the Middle Atlantic States, where 9.7% and 4.7% of visitors to Nova Scotia originated respectively.

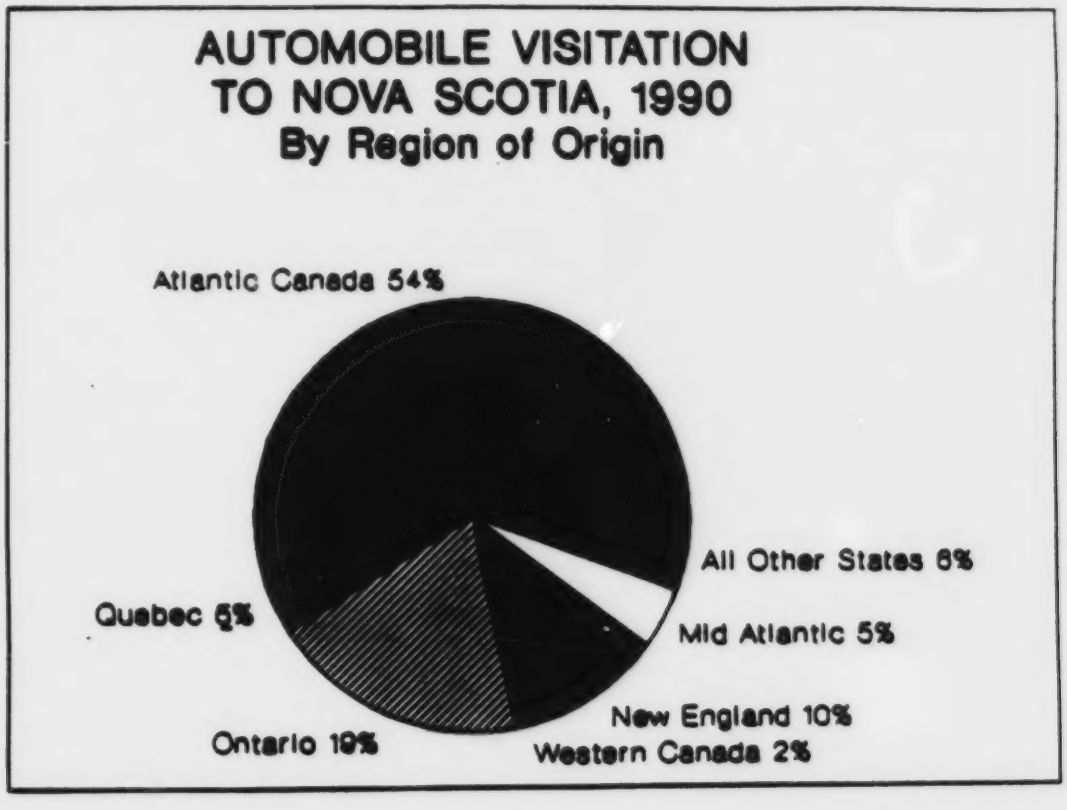


Table 6
Automobile Visitation to Nova Scotia
by Region of Origin, 1989-90

Region of Origin	1989 #	1989 %	1990 #	1990 %
Atlantic Canada	446,631	53.0%	437,776	53.9%
Quebec	48,034	5.7%	39,798	4.9%
Ontario	167,697	19.9%	156,755	19.3%
Western Canada	14,326	1.7%	14,620	1.8%
Total Canada	676,688	80.3%	648,948	79.9%
New England	85,955	10.2%	78,783	9.7%
Middle Atlantic	38,764	4.6%	38,173	4.7%
East North Central	4,214	0.5%	12,183	1.5%
West North Central	3,371	0.4%	2,437	0.3%
South Atlantic	22,753	2.7%	21,929	2.7%
East South Central	1,685	0.2%	1,624	0.2%
West South Central	2,528	0.3%	2,437	0.3%
Mountain	1,685	0.2%	1,624	0.2%
Pacific	3,371	0.4%	3,249	0.4%
Total United States	164,327	19.5%	162,440	20.0%
Total	842,700	99.8%	812,200	99.9%

* Due to rounding, numbers may not always add to total.

Auto Visitor Point of Entry

As in previous years, the majority of overnight automobile visitors in 1990 entered Nova Scotia at Amherst. Almost 70% of Canadian and 35% of American visitors travelled to Nova Scotia through Amherst making it the main point of entry for both markets.

Caribou remained the second largest overnight automobile visitor entry point with visitor volume increasing by 4.1% in 1990.

Yarmouth, in spite of experiencing a 5.8% decline in automobile volume, was the third largest point of entry and the second largest for Americans.

Digby and Tidnish experienced the largest drop in automobile visitor volume with declines of 7.9% and 10.8% respectively.

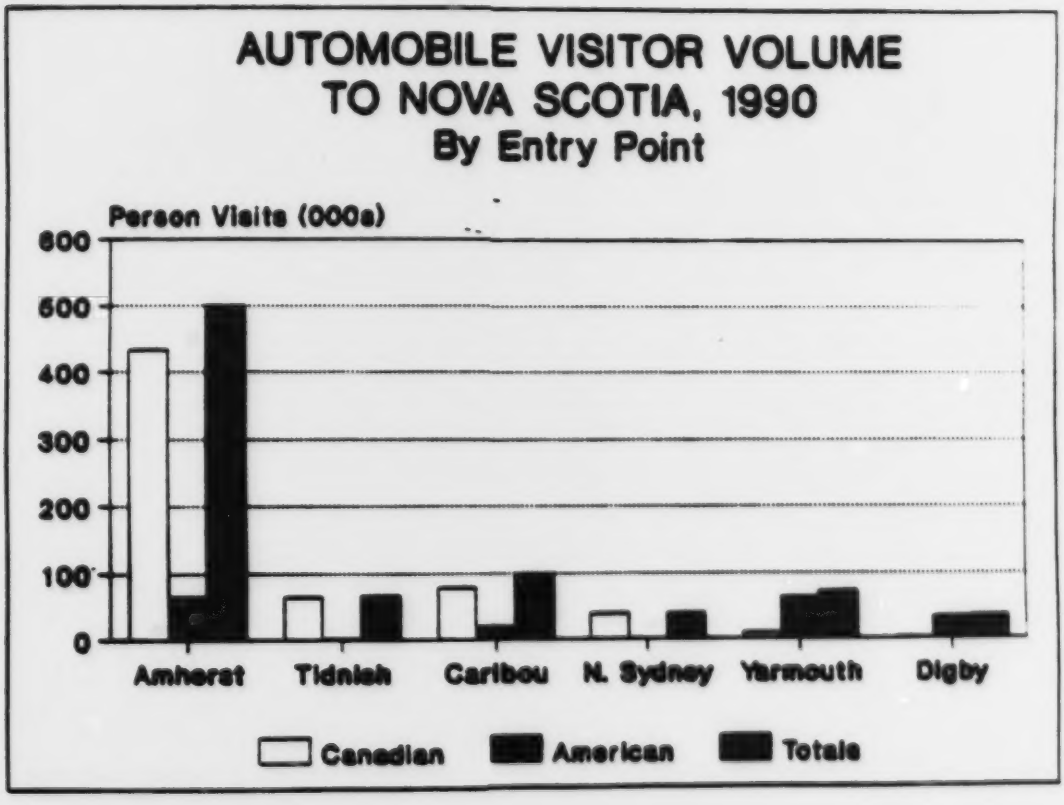


Table 7
Canadian and American Automobile Visitor Volume to Nova Scotia by Entry Point, 1989-90

	Canadian	American	Total	% of Ttl	1989	% Change
Amherst	434,400	64,900	499,300	61.5%	516,400	-3.3%
Tidnish	65,200	2,200	67,400	8.3%	75,600	-10.8%
Caribou	79,000	19,500	98,500	12.1%	94,600	4.1%
North Sydney *	39,400		39,400	4.9%	41,000	-3.9%
Yarmouth	8,400	63,100	71,500	8.8%	75,900	-5.8%
Digby	1,700	34,400	36,100	4.4%	39,200	-7.9%
Total	628,100	184,100	812,200	100.0%	842,700	-3.6%

* Americans entering Nova Scotia at North Sydney via automobile have already entered the province elsewhere and are not included in the count.

Recreational Vehicle Visitors

Recreational vehicle traffic experienced another sharp decline in volume during the 1990 season, down 16.5% from the 1989 volume of 94,700. The 79,100 person visits made by recreational vehicle travellers between May 15 and October 31, 1990 represented 6.9% of total visitor volume to Nova Scotia during that time period.

Recreational Vehicle Visitor Seasonal Patterns

July and August accounted for over 65% of recreational vehicle traveller volume in 1990. The fall shoulder season experienced an above average decline of 20% relative to the same period in 1989.

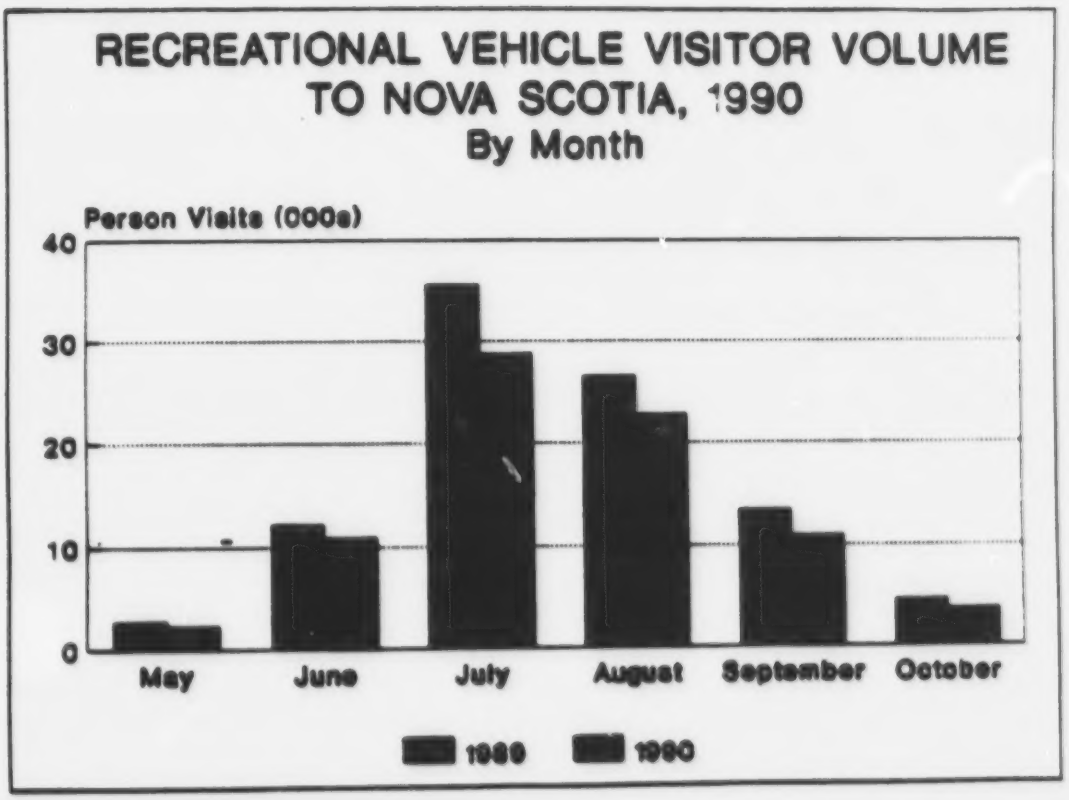


Table 8
Recreational Vehicle Visitor Volume to Nova Scotia
by Month and Entry Point, 1989-90

	May	June	July	August	September	October	Total
Amherst	1,800	8,300	21,900	17,200	7,700	2,700	59,600
Tidnish	100	200	600	600	100	100	1,700
Caribou	100	800	2,600	2,300	1,400	300	7,500
N.Sydney	0	300	500	200	100	0	1,100
Yarmouth	100	400	1,100	700	600	100	3,000
Digby	200	800	2,100	1,800	900	400	6,200
1990 Ttl	2,300	10,800	28,800	22,800	10,800	3,600	79,100
% of Ttl	2.9%	13.7%	36.4%	28.8%	13.7%	4.6%	100.0%
1989 Ttl	2,700	12,100	35,500	26,500	13,400	4,500	94,700
% Change	-14.8%	-10.7%	-18.9%	-14.0%	-19.4%	-20.0%	-16.5%

* Due to rounding, numbers may not always add to total.

Recreational Vehicle Visitor Origin

The regional origin of recreational vehicle visitors differs significantly from that for automobile travellers.

Unlike automobile visits where the majority of visitors to Nova Scotia came from Atlantic Canada, only one in five recreational vehicle visitors originated from New Brunswick, Newfoundland, or Prince Edward Island. The proportion of Atlantic Canadian visitors declined 2.5 percentage points during 1990 to 21.8%.

Ontario accounted for over a quarter of recreational vehicle visitors, making it the largest source of recreational vehicle visitors. Only 5.2% of recreational vehicle visitors to Nova Scotia originated in Quebec, while Western Canada was the source of 6.7% of recreational vehicle travellers.

Four in ten 1990 recreational vehicle visits to Nova Scotia originated in the United States. In spite of the unfavorable overall trend in recreational vehicle visitation, 1990 yielded a 3.4 percentage point increase in American recreational vehicle visits to Nova Scotia. While the origin of American recreational vehicle visitors was more dispersed than for automobile travellers, two thirds of American recreational travellers originated from the eastern seaboard.

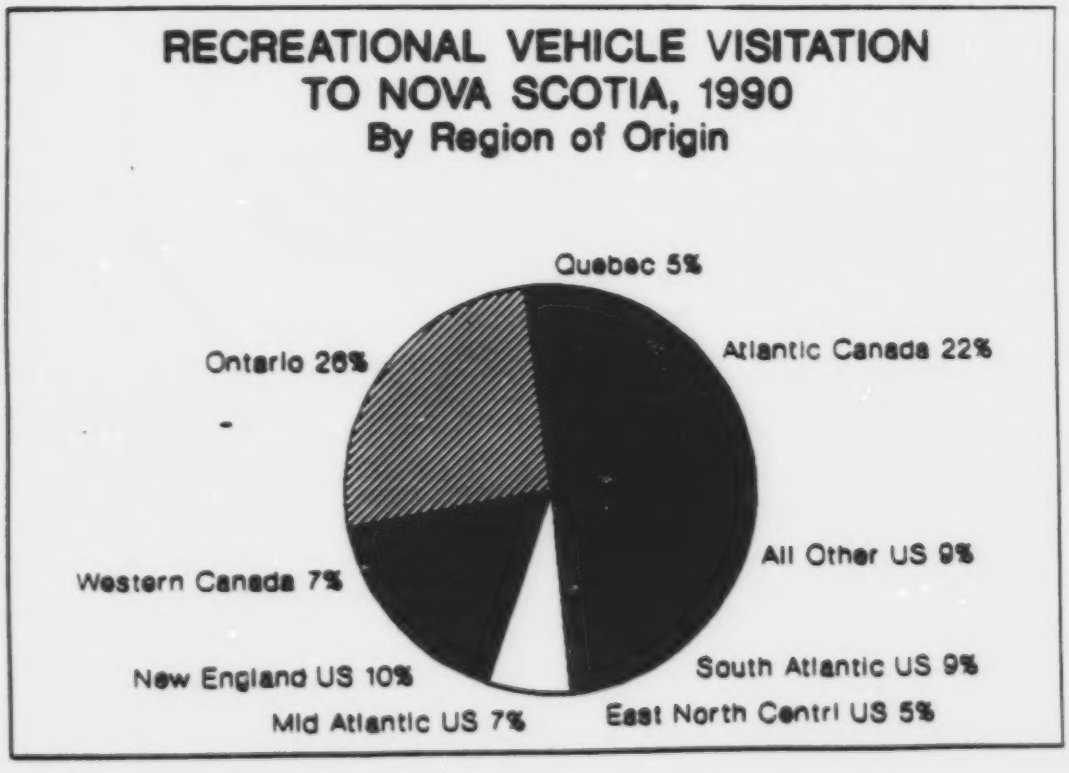


Table 9
Recreational Vehicle Visitation to Nova Scotia
by Region of Origin, 1989-90

Region of Origin	1989 #	1989 %	1990 #	1990 %
Atlantic Canada	23,012	24.3%	17,244	21.8%
Quebec	5,682	6.0%	4,113	5.2%
Ontario	25,190	26.6%	20,329	25.7%
Western Canada	5,682	6.0%	5,300	6.7%
Total Canada	59,566	62.9%	46,985	59.4%
New England	9,091	9.6%	7,989	10.1%
Middle Atlantic	5,682	6.0%	5,300	6.7%
East North Central	4,451	4.7%	3,955	5.0%
West North Central	1,421	1.5%	1,107	1.4%
South Atlantic	7,765	8.2%	7,356	9.3%
East South Central	663	0.7%	712	0.9%
West South Central	1,705	1.8%	1,582	2.0%
Mountain	947	1.0%	949	1.2%
Pacific	3,409	3.6%	3,085	3.9%
Total United States	35,134	37.1%	32,036	40.5%
Total	94,700	100.0%	79,100	99.9%

* Due to rounding, numbers may not always add to total.

Recreational Vehicle Visitor Point of Entry

The decline in recreational vehicle traveller volume was measured at all entry points

Amherst, which accounted for three quarters of all recreational vehicle traffic to Nova Scotia, experienced the smallest decline of 11.6%.

Caribou, the second largest point of entry for recreational vehicles with 9.5% of total recreational vehicle volume, experienced a 29.9% decline in volume over the same period in 1989.

Digby, the third largest point of entry accounting for 8.0% of 1990 recreational vehicle traffic into Nova Scotia, experienced a decline of 16.0%.

North Sydney experienced the largest drop in volume in 1990 with a 68.6% decline.

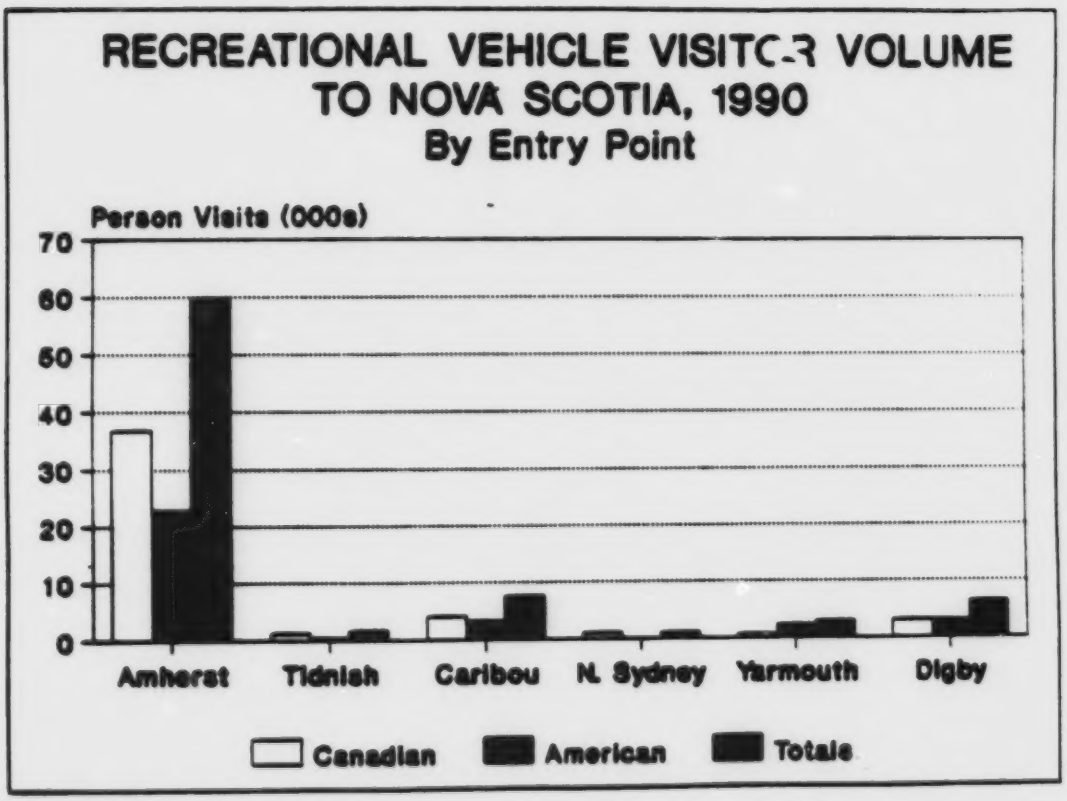


Table 10
Canadian and American Recreational Vehicle Visitor Volume to Nova Scotia by Entry Point, 1989-90

	Canadian	American	Total	% of Ttl	1989	% Change
Amherst	36,800	22,800	59,600	75.3%	67,400	-11.6%
Tidnish	1,300	400	1,700	2.1%	2,100	-19.0%
Caribou	4,100	3,400	7,500	9.5%	10,700	-29.9%
North Sydney *	1,100	0	1,100	1.4%	3,500	-68.6%
Yarmouth	600	2,300	2,900	3.7%	3,500	-17.1%
Digby	3,100	3,200	6,300	8.0%	7,500	-16.0%
Total	47,000	32,100	79,100	100.0%	94,700	-16.5%

* Americans entering Nova Scotia at North Sydney via recreational vehicle have already entered the province elsewhere and are not included in the count.

Motorcoach Visitors

After showing positive growth in 1989, 1990 motorcoach visitation volume growth reversed, dropping 14.3% from the 1989 level of 52,300. Between May 15 and October 31, 1990, motorcoach visitor volume was 44,800 or approximately 3.9% of total visitor volume during that period.

Motorcoach Visitor Seasonal Patterns

While the July and August summer months of 1990 still accounted for nearly half the total motorcoach visitor volume, another four in ten motorcoach visitors to Nova Scotia come during the fall shoulder season.

This trend towards increasing emphasis on the shoulder seasons continued in 1990 with July and August experiencing above average declines in volume, dropping 17.4% and 19.5% respectively.

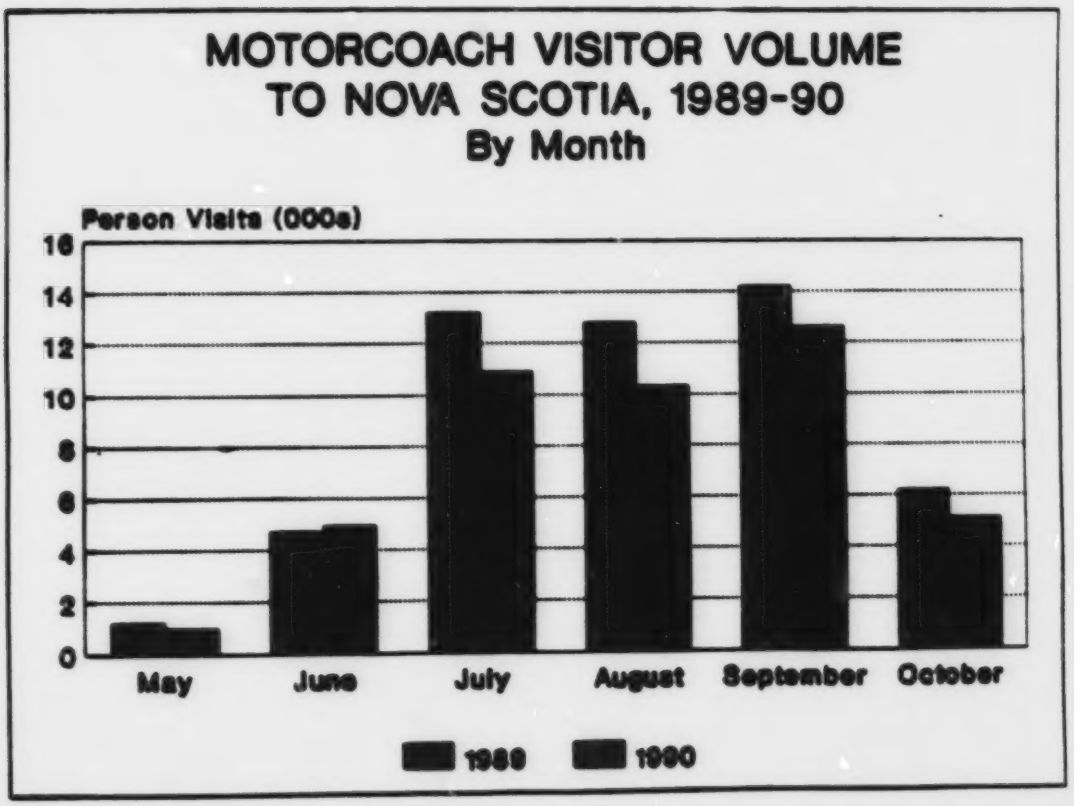


Table 11
Motorcoach Visitor Volume to Nova Scotia
by Month and Entry Point, 1989-90

	May	June	July	August	September	October	Total
Amherst	400	1,900	3,100	2,400	3,700	2,100	13,600
Tidnish	0	100	100	0	100	0	300
Caribou	0	300	900	1,000	1,400	500	4,100
N.Sydney	100	200	100	100	0	200	700
Yarmouth	400	2,100	5,400	5,700	5,900	2,000	21,500
Digby	100	300	1,300	1,100	1,500	300	4,600
1990 Ttl	1,000	4,900	10,900	10,300	12,600	5,100	44,800
% of Ttl	2.2%	10.9%	24.3%	23.0%	28.1%	11.4%	100.0%
1989 Ttl	1,200	4,700	13,200	12,800	14,200	6,200	52,300
% Change	-16.7%	4.3%	-17.4%	-19.5%	-11.3%	-17.7%	-14.3%

* Due to rounding, numbers may not always add to total.

Motorcoach Visitor Origin

Unlike the automobile and recreational vehicle traveller markets, the majority of motorcoach tours originated in the United States.

About two thirds of motorcoach visitors were American with over 50% from the eastern seaboard. Within this seaboard area, the Mid-Atlantic states of New York, New Jersey, and Pennsylvania accounted for one quarter of motorcoach visitors to Nova Scotia. A further 17.6% of motorcoach traffic originated in the New England states, while the South Atlantic states accounted for another 8.5%.

The remaining third of Nova Scotia's motorcoach visitors originated in Canada, with Atlantic Canada contributing 16.3% and Ontario 10.3%.

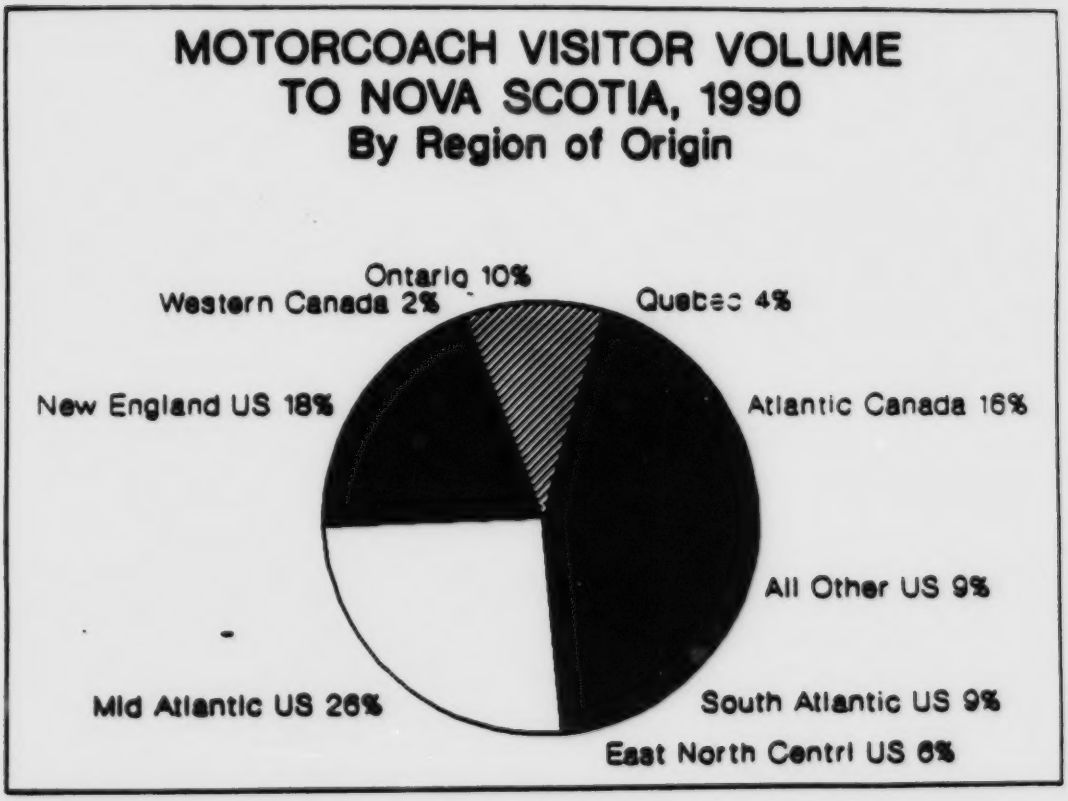


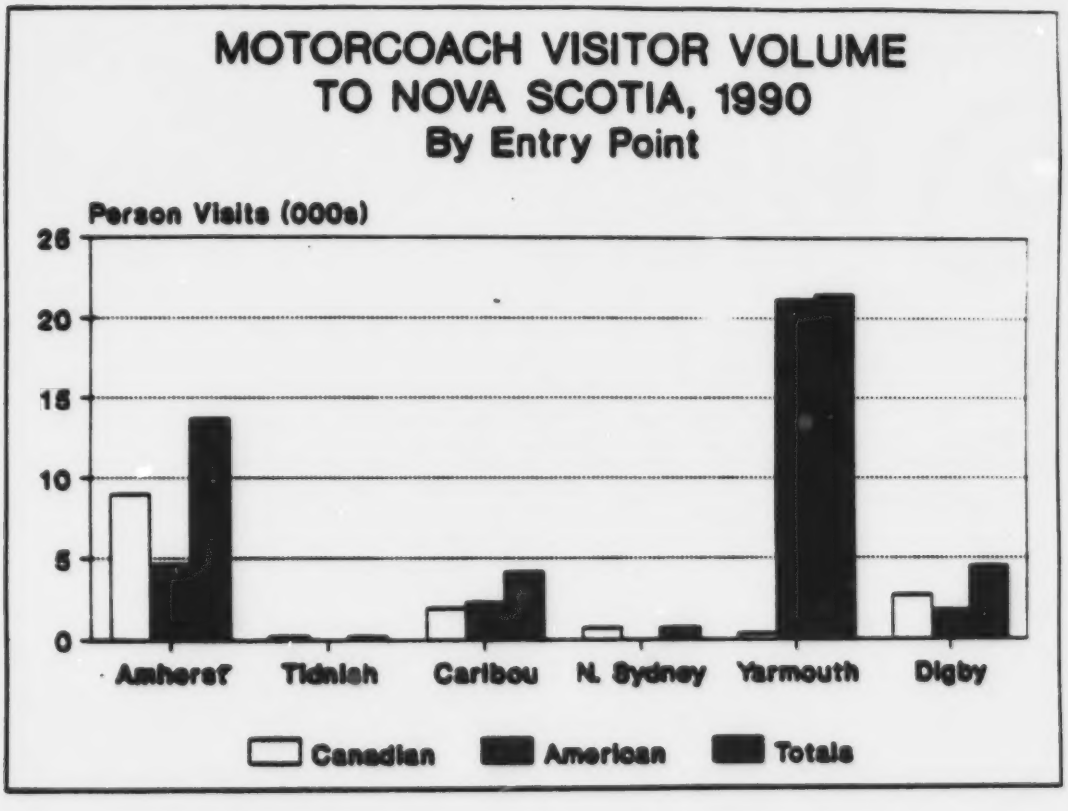
Table 12
Motorcoach Visitation to Nova Scotia
by Region of Origin, 1989-90

Region of Origin	1989		1990	
	#	%	#	%
Atlantic Canada	9,466	18.1%	7,302	16.3%
Quebec	2,249	4.3%	1,926	4.3%
Ontario	5,648	10.8%	4,614	10.3%
Western Canada	889	1.7%	941	2.1%
Total Canada	18,253	34.9%	14,784	33.0%
New England	7,636	14.6%	7,885	17.6%
Middle Atlantic	12,552	24.0%	11,558	25.8%
East North Central	3,923	7.5%	2,598	5.8%
West North Central	1,308	2.5%	1,254	2.8%
South Atlantic	4,236	8.1%	3,808	8.5%
East South Central	994	1.9%	896	2.0%
West South Central	1,308	2.5%	582	1.3%
Mountain	1,203	2.3%	717	1.6%
Pacific	889	1.7%	717	1.6%
Total United States	34,047	65.1%	30,016	67.0%
Total	52,300	100.0%	44,800	100.0%

Motorcoach Visitor Point of Entry

In contrast to automobile and recreational vehicle travellers, the primary entry point for motorcoach visitors was Yarmouth through which almost half of all motorcoach travellers entered the province. Yarmouth's proximity to the United States was a determining factor with over 70% of all American motorcoach visitors having entered Nova Scotia via this point.

Amherst, which received another three in ten motorcoach travellers to Nova Scotia, experienced a 24.3% decline in volume compared to 1989 levels. It remained the primary entry point for Canadian motorcoach visitors with 61% of such visitors having entered Nova Scotia there.



Although North Sydney accounts for only 1.6% of motorcoach visitor volume, it was the only point to experience an increase in volume - a substantial increase of 600%.

Table 13
Canadian and American Motorcoach Visitor Volume
by Entry Point, 1989-90

	Canadian	American	Total	% of Ttl	1989	% Change
Amherst	9,000	4,700	13,700	30.6%	18,100	- 24.3%
Tidnish	200		200	0.4%	600	- 66.7%
Caribou	1,900	2,300	4,200	9.4%	4,800	- 12.5%
North Sydney *	700		700	1.6%	100	+600.0%
Yarmouth	300	21,200	21,500	48.0%	23,300	- 7.7%
Digby	2,700	1,800	4,500	10.0%	5,400	- 16.7%
Total	14,800	30,000	44,800	100.0%	52,300	- 14.3%

* Americans entering Nova Scotia at North Sydney via motorcoach have already entered the province elsewhere and are not included in the count.

AIR VISITOR VOLUME

Air travel was the second largest mode of transportation for visitors to Nova Scotia between May 15 and October 31, 1990. Almost two of every ten visitors to Nova Scotia during that period entered the province via air travel.

Air visitation was also the only mode of travel measured which increased over 1989 levels, growing 9.7% during the May 15 to October 31, 1990 period to 215,000.

Air Visitor Origin

Seven of ten non-resident air travellers to Nova Scotia originated from Canada. Ontario accounted for 34.9% of all air travellers, Western Canada 17.1%, and Atlantic Canada 12.6%.

Two of ten non-resident air travellers originated in the United States with the eastern seaboard states accounting for nearly all American air travellers.

The remaining 8.5% of non-resident air travellers were from the United Kingdom, Europe, and other overseas countries.

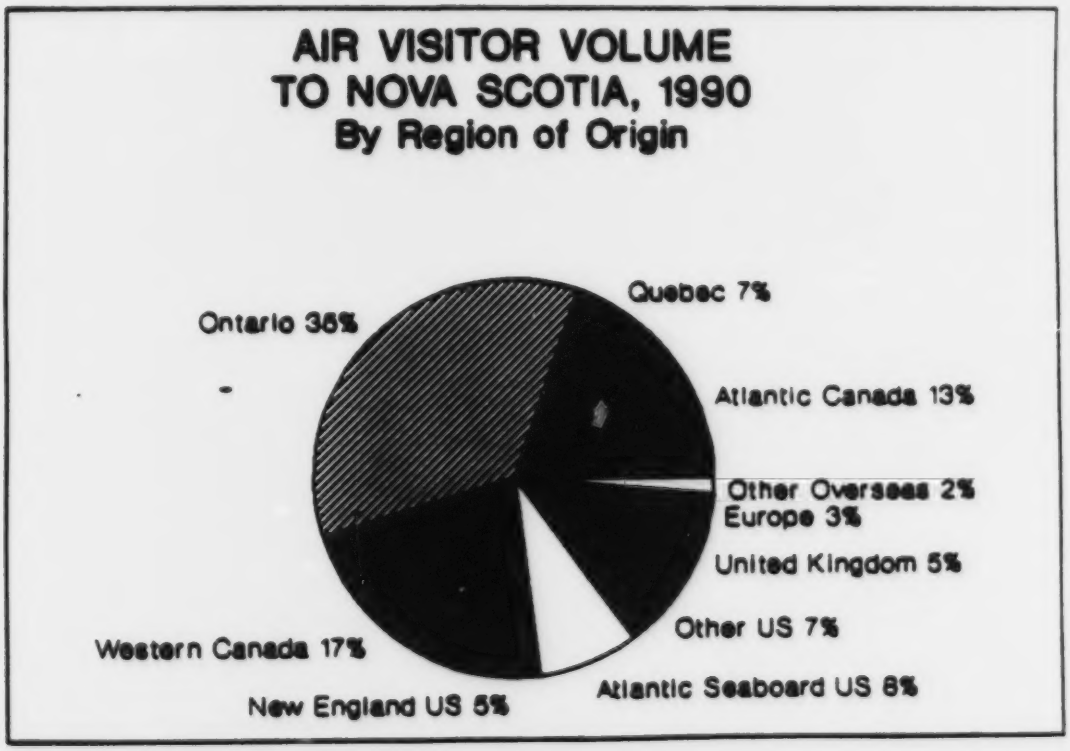


Table 14
Air Visitation to Nova Scotia
by Region of Origin, 1990

Region of Origin	1990 #	1990 %
Atlantic Canada	27,090	12.6%
Quebec	15,480	7.2%
Ontario	75,035	34.9%
Western Canada	36,765	17.1%
Total Canada	154,370	71.8%
New England	10,965	5.1%
Middle Atlantic	8,600	4.0%
East North Central	3,440	1.6%
West North Central	1,935	0.9%
South Atlantic	8,600	4.0%
East South Central	1,290	0.6%
West South Central	1,075	0.5%
Mountain	1,075	0.5%
Pacific	4,730	2.2%
Total United States	41,710	19.4%
United Kingdom	9,890	4.6%
Europe	5,375	2.5%
Other Overseas	3,010	1.4%
Total Offshore	18,275	8.5%
Total	215,000	100.0%

* Due to rounding, numbers may not always add to total.

Air Visitor Trip Purpose

Almost four in ten air travellers to Nova Scotia cited visiting friends or relatives as the primary trip purpose. Another three in ten cited business (selling, conventions, etc.) as the primary reason for visiting Nova Scotia. Pleasure/recreation accounted for another two in ten travellers. The remaining 10% of non-resident air travellers cited a wide variety of other reasons for visiting Nova Scotia.

Table 15
Air Visitation to Nova Scotia
by Trip Purpose, 1990

Trip Purpose	% of Total
Visiting Friends/Relatives	39%
Pleasure/Recreation	20%
Convention	18%
Business (Selling, etc.)	10%
Just Passing Through	5%
Attend Special Event/Attraction	3%
Personal Business	2%
Motorcoach Tour	1%
Visit Vacation Home	1%
Other	1%
Total	100%

Air Visitor Length of Stay

The average stay in Nova Scotia for non-resident air travellers was 7.89 nights. Half the air travellers stayed 5 nights or less, three in ten stayed 6 to 10 nights, 15% stayed 11 to 15 nights, and the remaining 7% stayed longer than 15 nights.

Table 16
Air Visitation to Nova Scotia
by Length of Stay, 1990

Nights	1990
2 or less	20 %
3 to 5	28 %
6 to 10	30 %
11 to 15	15 %
16 to 25	4 %
26 or more	3 %
Total	100 %
Average Stay	7.89 nights

Air Visitor Party Size

The average party size for non-resident air travellers was 1.78 people. Almost 90% of the travellers surveyed indicated their party size was either one or two people

Table 17
Air Visitation to Nova Scotia
by Party Size, 1990

Number of People	1990
1	41 %
2	46 %
3	9 %
4	4 %
5 or more	1 %
Total	100 %
Average Size	1.7[illegible] People

* Due to rounding, numbers may not always add to total.

APPENDIX:

VISITOR VOLUME

DEFINITIONS & TERMS

Description of Regions of Origin

Atlantic Canada	New Brunswick, Newfoundland, Prince Edward Island For this report, Nova Scotia is excluded from the Atlantic Canada grouping.
Western Canada	Manitoba, Saskatchewan, Alberta, British Columbia, North West Territories, Yukon
New England	Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut
Middle Atlantic	New York, New Jersey, Pennsylvania
East North Central	Ohio, Indiana, Illinois, Michigan, Wisconsin
West North Central	Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas
South Atlantic	Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida
East South Central	Kentucky, Tennessee, Alabama, Mississippi
West South Central	Arkansas, Louisiana, Oklahoma, Texas
Mountain	Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Neveda
Pacific	Alaska, Washington, Oregon, California, Hawaii

1990 NOVA SCOTIA

FIXED-ROOF

ACCOMMODATION REPORT

Research Section

Nova Scotia Department

of Tourism and Culture

FORWARD

The Nova Scotia Department of Tourism and Culture has been monitoring fixed-roof accommodation performance in the province since 1985. Accommodation statistics are a key indicator in gauging both the overall performance of the hospitality industry in Nova Scotia and the activity levels within the various tourism regions.

This report consists of two main components. The first details the inventory of licensed properties and rooms available in the province. This information is collected by the Department's Training and Inspection Services Section, which is responsible for licensing all fixed-roof accommodation properties in the province with three or more rooms. The section provides a complete overview of properties operating throughout the province by type, by region and by county.

The second component of the report presents a summary of industry performance and trends in demand for fixed-roof properties including room sales and occupancy rates by month, property type, and tourism region. This information is generated from occupancy returns forwarded by operators to the Department's Research Section. The Department gratefully acknowledges the co-operation of accommodation operators in supplying this invaluable information.

The report contains a number of terms that have specific meaning in the context of the accommodation sector. For an explanation, please consult the glossary of terms contained in the appendix.

The Accommodation Report is one of four documents which collectively form the 1990 Tourism Statistical Review. Other documents which comprise the 1990 Tourism Statistical Review and which are also available under separate cover include the Economic Impact Report, the Visitor Volume Report, and the Campground Report.

TABLE OF CONTENTS

1990 ACCOMMODATION SUPPLY

Overview of Fixed-Roof Accommodation Supply 1
Supply by Type of Fixed-Roof Accommodation 3
Supply by Size of Fixed-Roof Accommodation 6
Fixed-Roof Accommodation Supply by Region 7
Fixed-Roof Accommodation Supply by County 11

1990 ACCOMMODATION DEMAND

Overview of Fixed-Roof Accommodation Demand 12
Seasonal Patterns in Demand 14
Demand by Type of Fixed-Roof Accommodation 16
Fixed-Roof Accommodation Demand by Region 18

APPENDIX A: DEFINITIONS & TERMS 20

APPENDIX B: TOURISM REGIONS OF NOVA SCOTIA 21

1990 ACCOMMODATION SUPPLY

Overview of Fixed-Roof Accommodation Supply

In 1990, there were 633 fixed-roof accommodation properties in Nova Scotia offering 12,675 rooms. While the number of accommodation grew 3.3%, the number of rooms available grew 0.7%.

Table 1
Summary of Fixed-Roof Accommodation Supply, 1988-90

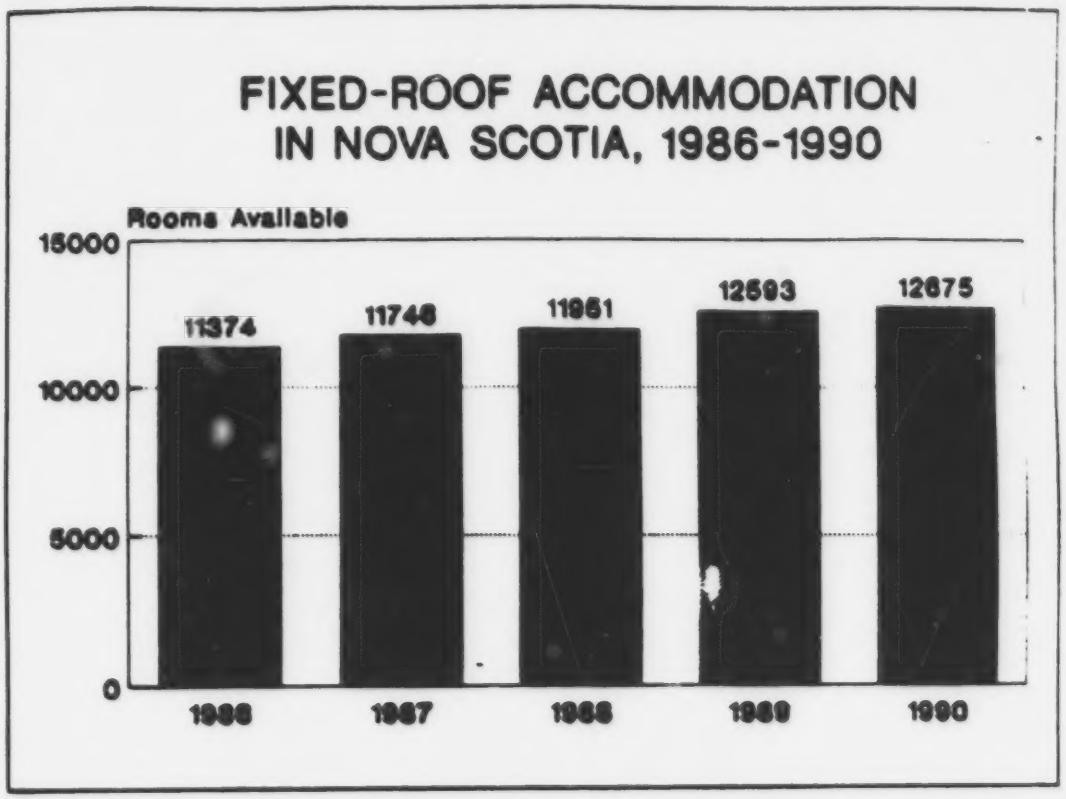
	1988	1989	1990
Number of Fixed-Roof Accommodation	550	613	633
Increase in Rooms (from previous year)	563	833	514
Decrease in Rooms (from previous year)	-358	-191	-432
Net Change in Rooms (from previous year)	205	642	82
Number of Rooms for Sale (1)	11,951	12,593	12,675
Number of Year Round Fixed-Roof Accommodation	293	338	342
Number of Seasonal Fixed-Roof Accommodation	257	275	291

(1) If a cottage has two bedrooms in one unit and it is always rented as one unit, the cottage is considered as one room for sale.

Table 2
Number of Fixed-Roof Accommodations Offering Various Facilities, 1990

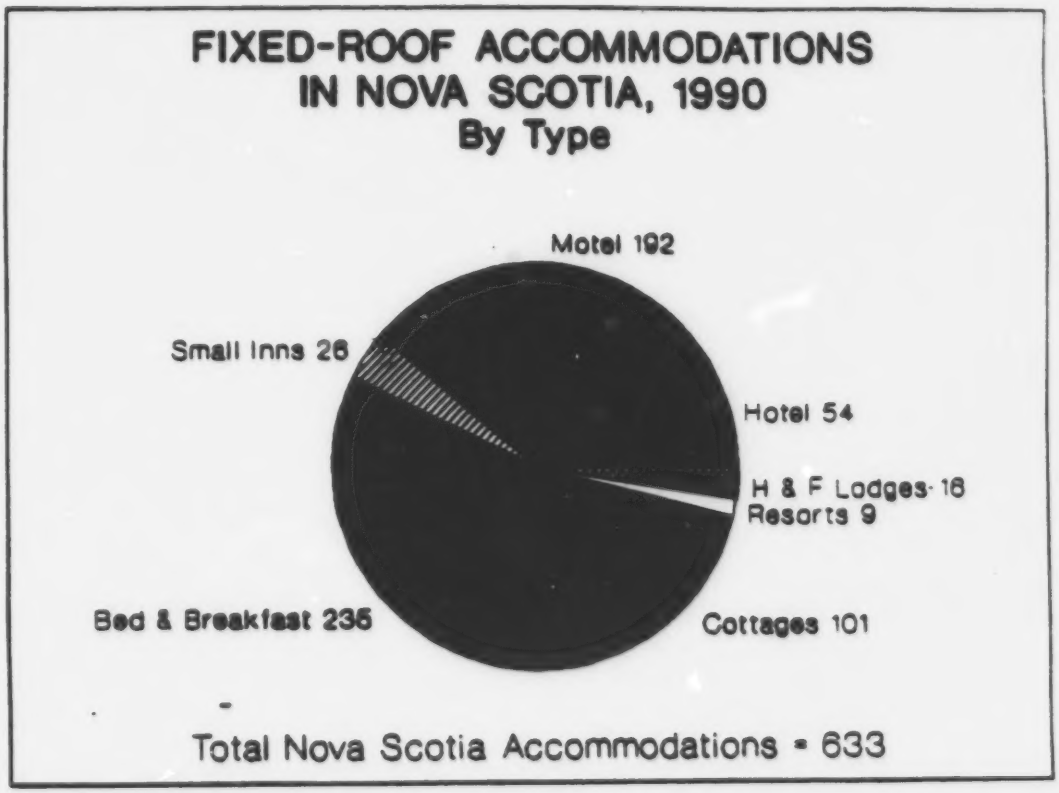
		1988	1989	1990
Bath:	Private	310	350	361
	Shared	240	228	239
	Combination Shared/Private Bath	-	35	33
Housekeeping Facilities		162	168	179
Swimming Pool:	Indoor	32	38	39
	Outdoor	59	64	74
Meals:	Breakfast	342	411	458
	Lunch	154	158	163
	Dinner	177	184	199

The number of fixed-roof accommodation rooms available in Nova Scotia has grown steadily between 1986 and 1990. During this period, the number of fixed-roof accommodation rooms grew 11.4% or on average, 1.8% annually.



Supply by Type of Fixed-Roof Accommodation

The largest two suppliers of fixed-roof accommodation rooms in 1990 were Hotels and Motels which accounted for 36% and 43% of the total room supply, respectively. Bed and Breakfasts accounted for another 7% of total rooms, Cottages 6%, and Resorts 5%. Hunting & Fishing Lodges, which grew 9.7%, and Bed & Breakfasts, which grew 4.3%, were the two segments experiencing the largest relative growth in 1990. Small Inns, Cottages, and Resorts each experienced about a 2% growth in rooms available in 1990.



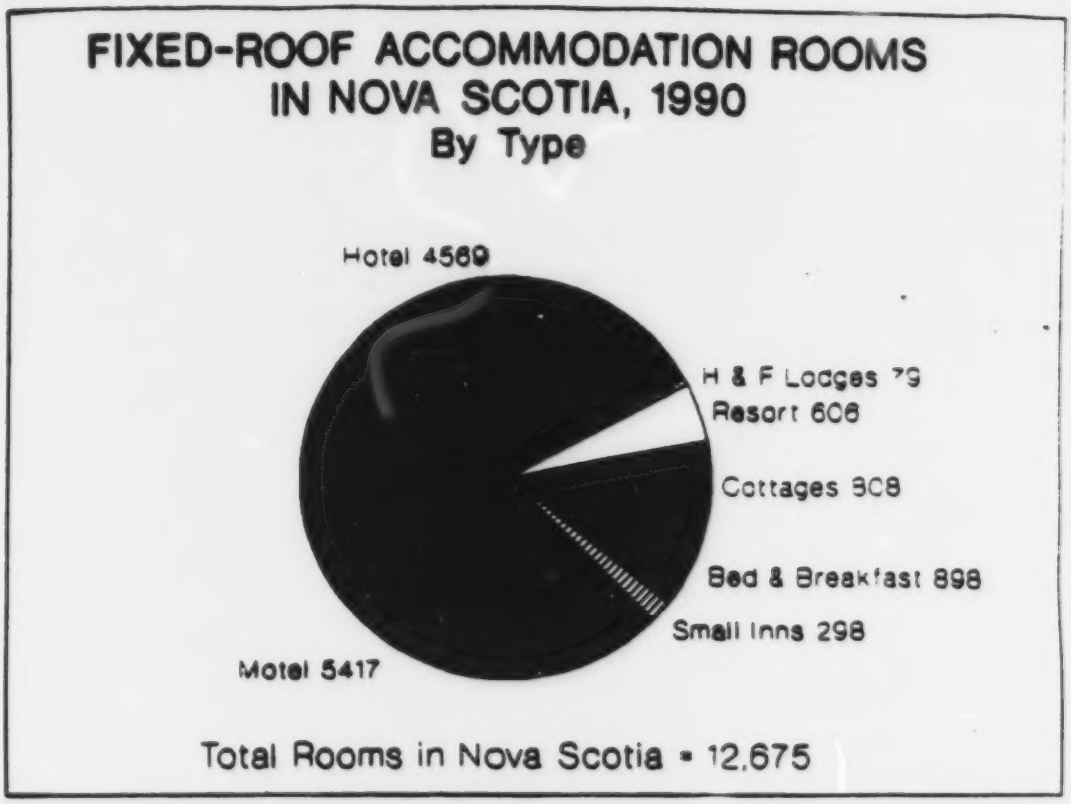


Table 3
Fixed-Roof Accommodation Properties and Rooms by Classification, 1989-90

	Hotel	Motel	Sm Inns	B & B	Cottages	Resorts	H & F Lodges	Total
Properties								
1989	54	189	25	223	99	9	14	613
1990	54	192	26	235	101	9	16	633
Net Change	0	+3	+1	+12	+2	0	+2	+20
% Change	0.0%	1.6%	4.0%	5.4%	2.0%	0.0%	14.3%	3.3%
Rooms								
1989	4,540	5,441	291	861	792	596	72	12,593
1990	4,569	5,417	298	898	808	606	79	12,675
Net Change	+29	-24	+7	+37	+16	+10	+7	+82
% Change	0.6%	-0.4%	2.4%	4.3%	2.0%	1.7%	9.7%	0.7%

Table 4
Increase/Decrease in Fixed-Roof Accommodation Properties & Rooms by Classification, 1990

	Increases		Decreases		Net Change
	Prop.	Rooms	Prop.	Rooms	In Rooms
Hotels	N 1	50	C 2	28	+ 29
	A 2	13	R 3	6	
Motels	N 8	140	C 6	186	- 24
	A 10	80	R 12	58	
Small Inns	N 2	12	C 1	6	+ 7
	A 1	4	R 2	3	
B&B	N 32	107	C 21	83	+ 37
	A 7	17	R 4	4	
Cottages	N 9	54	C 7	46	+ 16
	A 6	17	R 4	9	
Resorts	N 1	8	C 0	0	+ 10
	A 1	2	R 0	0	
Hunting/Fishing Lodges	N 3	10	C 1	3	+ 7
	A 0	0	R 0	0	
Total	N 56	381	C 38	352	+ 82
	A 27	133	R 25	80	

N = New A = Additions C = Closed R = Reduced

Table 5
Increase/Decrease in Fixed-Roof Accommodation Rooms by Classification, 1989-90

	Increases		Decreases		Net Change	
	1989	1990	1989	1990	1989	1990
Hotels	227	63	22	34	+205	+ 29
Motels	285	220	64	244	+221	- 24
Small Inns	29	16	17	9	+ 12	+ 7
B&B	182	124	78	87	+104	+ 37
Cottages	91	71	7	55	+ 84	+ 16
Resorts	0	10	0	0	0	+ 10
H&F Lodges	19	10	3	3	+ 16	+ 7
Total	833	514	191	432	+642	+ 82

Supply by Size of Fixed-Roof Accommodation

Table 6
Fixed-Roof Accommodation
by Size, 1988-90

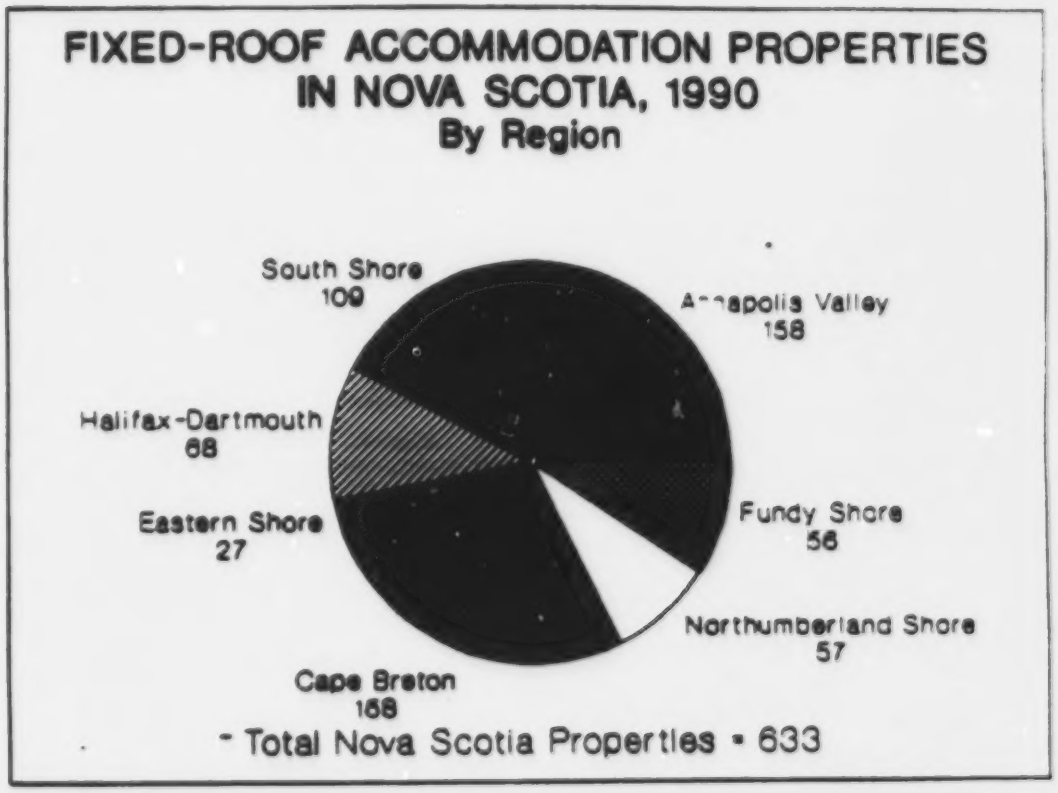
Number of Rooms	1988 #	1988 % of Total	1989 #	1989 % of Total	1990 #	1990 % of Total
3 - 10	335	61%	387	63%	418	66%
11 - 20	82	15%	86	14%	78	12%
21 - 30	32	6%	35	6%	38	6%
31 - 40	27	5%	25	4%	22	3%
41 - 50	16	3%	19	3%	20	3%
51 - 60	7	1%	7	1%	7	1%
61 - 70	11	2%	11	2%	12	2%
71 - 80	9	2%	12	2%	10	2%
81 - 90	6	1%	6	1%	5	1%
91 - 100	2	0%	2	0%	2	0%
101 - 150	11	2%	11	2%	9	1%
151 - 200	3	1%	3	0%	3	0%
201 - 300	6	1%	6	1%	6	1%
300 +	3	1%	3	0%	3	0%
Total	550	100%	613	100%	633	100%

Table 7
Average Number of Rooms
by Classification, 1988-90

Average Number of Rooms	1988	1989	1990
Average # of Hotel Rooms	86.3	84.0	84.6
Average # of Motel Rooms	27.3	28.8	28.2
Average # of Small Inn Rooms	12.4	11.6	11.4
Average # of B&B Rooms	4.0	3.9	3.8
Average # of Cottages	8.1	8.0	8.0
Average # of Resort Rooms	78.7	67.3	67.3
Average # of H&F Lodge Rooms	4.9	5.1	4.9
Average # of Rooms for All Fixed-Roof Accommodations	21.6	20.6	20

Fixed-Roof Accommodation Supply by Region

Regionally, Halifax-Dartmouth accounts for 33% of rooms available, Cape Breton 24%, Annapolis Valley 18%, South Shore 9%, Fundy Shore 8%, Northumberland Shore 6%, and Eastern Shore 2%. Growth in rooms available varied significantly from region to region. While South Shore experienced an 9.2% increase, Annapolis Valley and Eastern Shore experienced 2.7% and 3.0% growth respectively, Cape Breton declined 0.8%, and Fundy Shore dropped 3.9%.



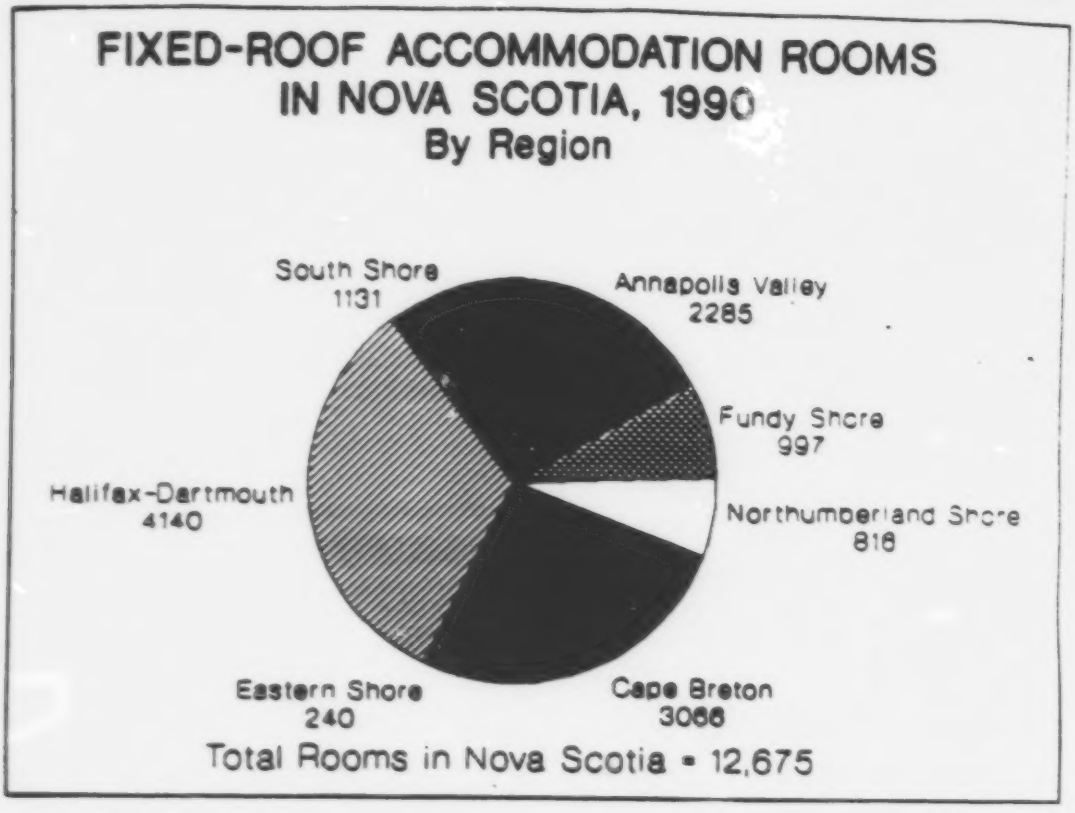


Table 8
Fixed-Roof Accommodation Properties and Rooms
by Region, 1989-90

	Annapolis Valley (AV)	South Shore (SS)	Hfx. Dart. (HD)	Eastern Shore (ES)	Cape Breton (CB)	North. Shore (NS)	Fundy Shore (FS)	Total
Properties								
1990	158	109	68	27	158	57	56	633
1991	169	98	70	24	160	56	56	613
Net Change	+9	+11	-2	+3	-2	+1	0	+20
% Change	6.0%	11.2%	-2.9%	12.5%	-1.3%	1.8%	0.0%	3.3%
Rooms								
1990 Rooms	2,285	1,131	4,140	240	3,066	816	997	12,675
1989 Rooms	2,226	1,036	4,133	233	3,092	835	1,038	12,593
Net Change	+59	+95	+7	+7	-26	-19	-41	+82
% Change	2.7%	9.2%	0.2%	3.0%	-0.8%	-2.3%	-3.9%	0.7%

Table 9
Fixed-Roof Accommodation Properties and Rooms
by Region and Classification, 1990

	Hotel		Motel		Small Inns		B & B	
	Prop	Rms	Prop	Rms	Prop	Rms	Prop	Rms
Annapolis	6	350	44	1,168	11	176	73	284
South Shore	3	91	28	574	9	77	49	179
Hfx-Dart	26	3,199	18	815	0	0	22	107
Eastern Shore	1	10	6	65	2	11	7	23
Cape Breton	13	693	55	1,512	2	20	39	155
North. Shore	4	136	19	519	0	0	22	78
Fundy Shore	1	90	22	764	2	14	23	72
TOTAL	54	4,569	192	5,417	26	298	235	898

	Cottages		Resorts		H&F Lodges		Total	
	Prop	Rms	Prop	Rms	Prop	Rms	Prop	Rms
Annapolis	19	175	1	113	4	19	158	2,285
South Shore	15	97	2	100	3	13	109	1,131
Hfx-Dart	2	19	0	0	0	0	68	4,140
Eastern Shore	6	36	2	86	3	9	27	240
Cape Breton	42	361	4	307	3	18	158	3,066
North. Shore	11	79	0	0	1	4	57	816
Fundy Shore	6	41	0	0	2	16	56	997
TOTAL	101	808	9	606	16	79	633	12,675

Table 10
Increase/Decrease in Fixed-Roof Accommodation Rooms by Region, 1990

	Hotel		Motel		Small Inns		B & B	
	(+)	(-)	(+)	(-)	(+)	(-)	(+)	(-)
Annapolis	0	1	42	22	0	3	39	15
South Shore	0	0	67	1	12	6	35	23
Hfx-Dart	13	1	6	5	0	0	7	13
Eastern Shore	0	0	0	0	0	0	3	0
Cape Breton	50	20	105	159	0	0	18	16
North. Shore	0	12	0	20	0	0	10	9
Fundy Shore	0	0	0	37	4	0	9	11
TOTAL	63	34	220	244	16	9	121	87

	Cottages		Resorts		H&F Lodges		Total	
	(+)	(-)	(+)	(-)	(+)	(-)	(+)	(-)
Annapolis	23	4	0	0	3	3	107	48
South Shore	1	0	10	0	0	0	125	30
Hfx-Dart	0	0	0	0	0	0	26	19
Eastern Shore	0	2	0	0	3	0	9	2
Cape Breton	27	31	0	0	0	0	200	226
North. Shore	8	0	0	0	4	0	22	41
Fundy Shore	12	18	0	0	0	0	25	66
TOTAL	71	55	10	0	10	3	514	432

Fixed-Roof Accommodation Supply by County

Table 11
Fixed-Roof Accommodation Rooms for Sale
by County, 1990

	Hotel		Motel		Small Inns		B & B	
	Prop	Rms	Prop	Rms	Prop	Rms	Prop	Rms
Annapolis	0	0	11	241	3	22	31	119
Antigonish	1	76	8	195	0	0	5	19
Cape Breton	7	629	14	549	0	0	19	75
Cumberland	0	0	12	299	2	14	9	31
Colchester	1	90	13	501	0	0	18	56
Digby	1	10	11	280	3	27	18	71
Guysborough	1	10	2	20	0	0	3	11
Halifax	26	3,199	26	899	3	17	31	138
Hants	0	0	4	80	0	0	7	23
Inverness	1	11	26	584	1	9	7	29
Kings	3	195	7	194	4	49	12	66
Lunenburg	2	73	13	357	6	58	28	103
Pictou	3	60	8	288	0	0	11	38
Queens	0	0	4	61	1	10	7	26
Richmond	2	13	3	43	0	0	0	0
Shelburne	1	18	5	106	1	3	9	31
Victoria	3	40	12	336	1	11	13	51
Yarmouth	2	145	13	384	1	78	7	31
TOTAL	54	4,569	192	5,417	26	298	235	898

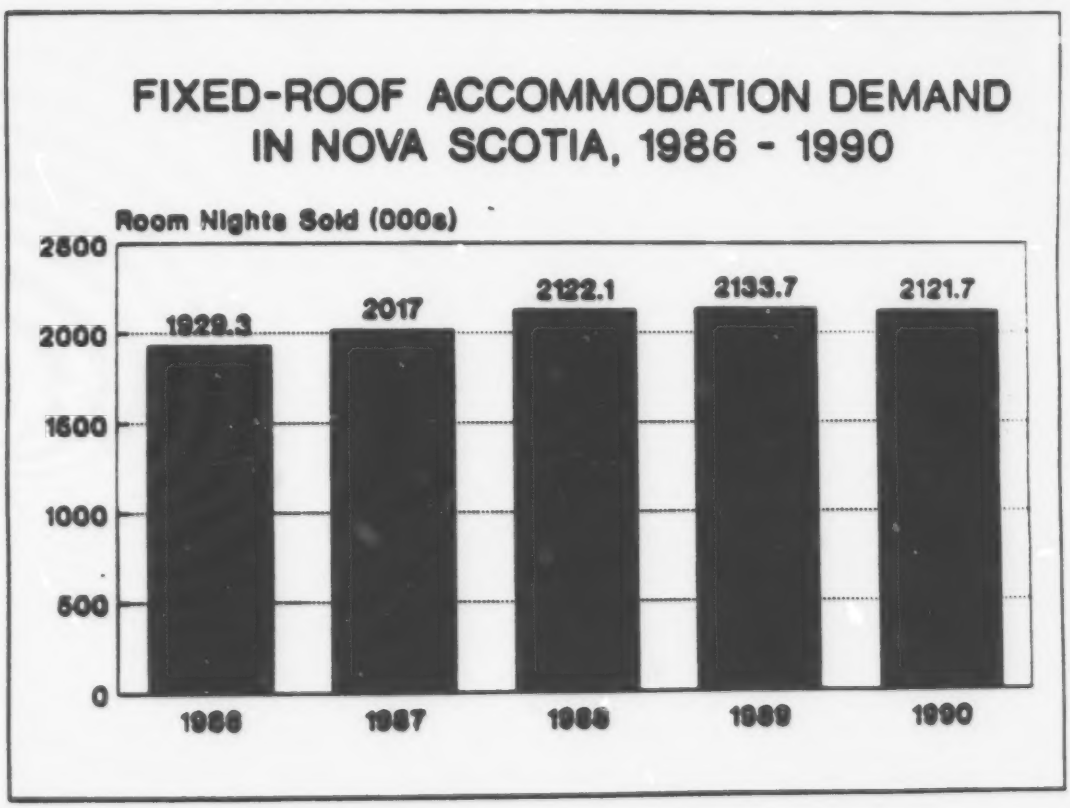
	Cottages		Resorts		H&F Lodges		Total	
	Prop	Rms	Prop	Rms	Prop	Rms	Prop	Rms
Annapolis	9	87	0	0	2	11	56	480
Antigonish	4	17	0	0	0	0	18	307
Cape Breton	5	42	0	0	1	3	46	1,298
Cumberland	3	25	0	0	0	0	26	369
Colchester	5	28	0	0	2	16	39	691
Digby	5	36	1	113	0	0	39	537
Guysborough	2	11	2	86	2	6	12	144
Halifax	11	74	0	0	1	3	98	4,330
Hants	1	4	0	0	0	0	12	107
Inverness	19	179	0	0	1	7	55	819
Kings	1	30	0	0	2	8	29	522
Lunenburg	4	35	1	8	0	0	54	634
Pictou	5	50	0	0	1	4	28	440
Queens	5	28	1	92	3	13	21	230
Richmond	4	35	1	39	1	8	11	138
Shelburne	1	4	0	0	0	0	17	162
Victoria	14	105	3	268	0	0	46	811
Yarmouth	3	18	0	0	0	0	26	656
TOTAL	101	808	9	606	16	79	633	12,675

1990 ACCOMMODATION DEMAND

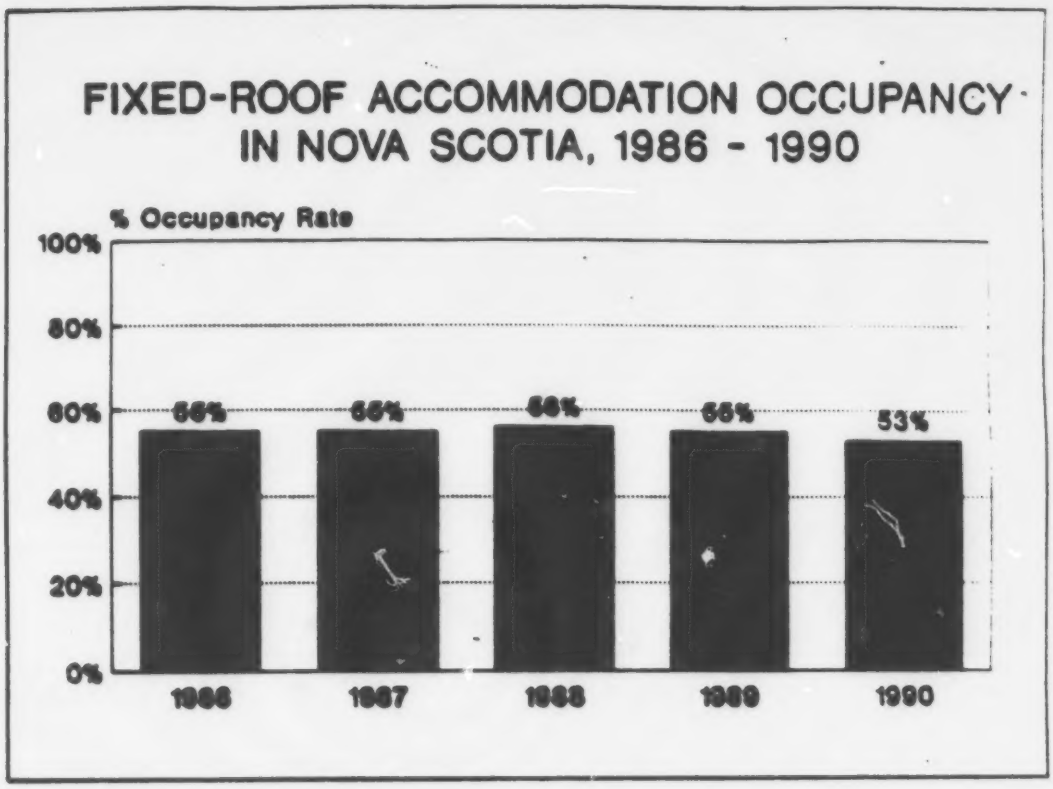
Overview of Fixed-Roof Accommodation Demand

Overall, fixed-roof accommodations in Nova Scotia in 1990 sold a total of 2,121,700 room-nights. This represents a 0.6% decrease from the 1989 season. As a result of this and a 0.7% increase in the number of rooms available, the average 1990 fixed-roof accommodation occupancy rate fell from 55% in 1989 to 53% in 1990.

Over the period 1986 to 1990, demand for fixed-roof accommodation grew 10% in total or on average, 1.8% annually. While the demand has grown 10% in total, the annual rate of growth has slowed since 1988.

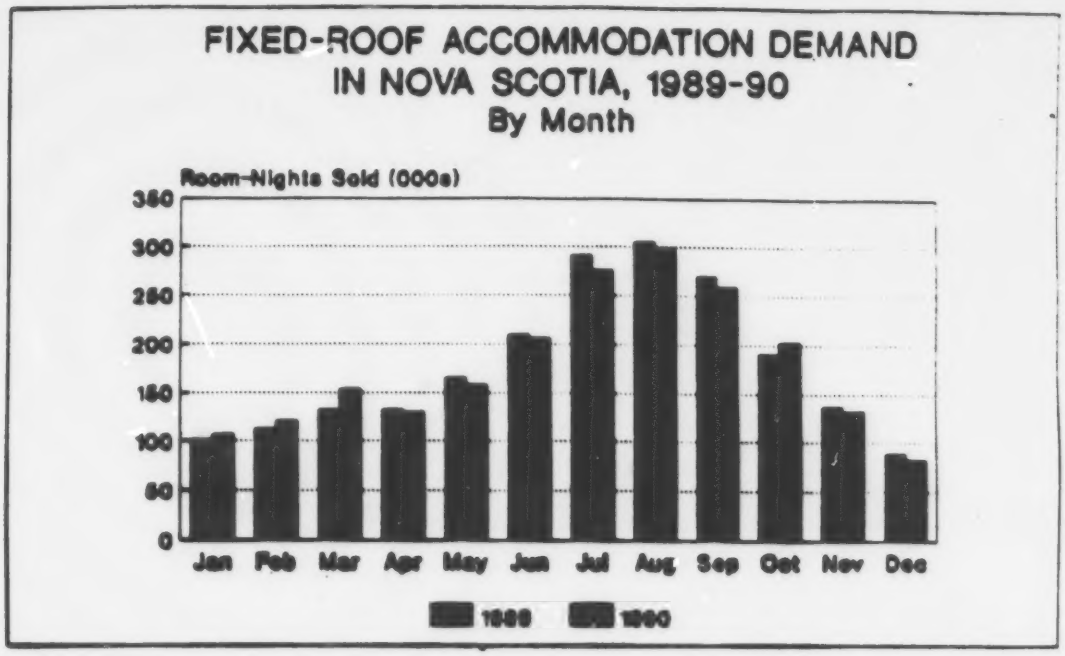


The average accommodation demand growth rate, for the period 1986 to 1990, of 1.8% matches the fixed-roof accommodation supply growth rate of 1.8% for the same period. As a result, occupancy levels on a provincial basis have remained fairly constant between 1986 and 1990.



Seasonal Patterns in Demand

Room-nights sold and occupancy rates fell in each of the last nine months of 1990 compared to 1989, with the exception of October. The number of rooms sold in October 1990 was 6% above that for October 1989, while 1990 occupancy rates were 2 percentage points above October 1989 levels.



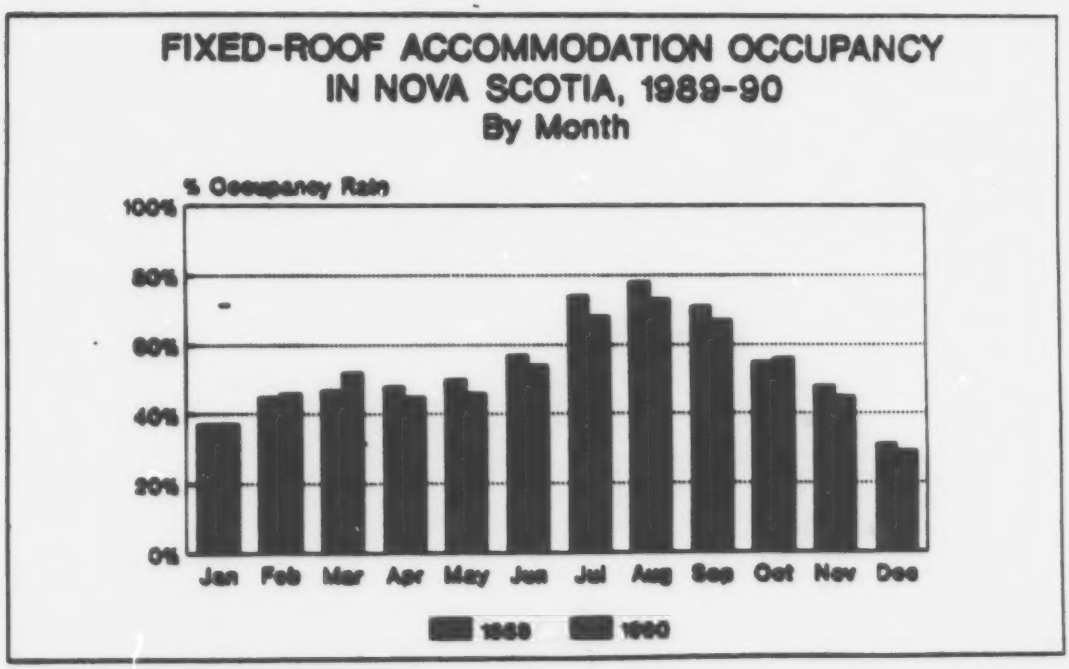


Table 12
Fixed-Roof Accommodation Room-Nights Sold and Occupancy Rates by Month, 1989-90

	Room-Nights Sold (000s)			Occupancy Rates		
	1989	1990	% Change	1989	1990	% Pt Change
Jan	102.1	106.3	+ 4%	37%	37%	- 0%
Feb	112.0	119.7	+ 7%	45%	46%	+ 1%
March	132.1	152.6	+16%	47%	52%	+ 5%
April	132.1	130.2	- 1%	48%	45%	- 3%
May	164.9	157.6	- 5%	50%	46%	- 4%
June	209.5	205.5	- 2%	57%	54%	- 3%
July	290.8	275.4	- 5%	74%	68%	- 6%
Aug	304.9	298.3	- 2%	78%	73%	- 5%
Sept	269.7	258.9	- 4%	71%	67%	- 4%
Oct	190.5	202.6	+ 6%	55%	56%	+ 1%
Nov	137.1	132.5	- 3%	48%	45%	- 3%
Dec	88.1	82.3	- 7%	31%	29%	- 2%
TOTAL	2,133.7	2,121.7	-0.6%	55%	53%	- 2%

Demand by Type of Fixed-Roof Accommodation

While overall demand for accommodations fell in 1990, Hotels, Small Inns, Cottages and Hunting & Fishing Lodges recorded increases in room-nights sold. However of the four, only Hunting & Fishing Lodges experienced an increase in occupancy rates.

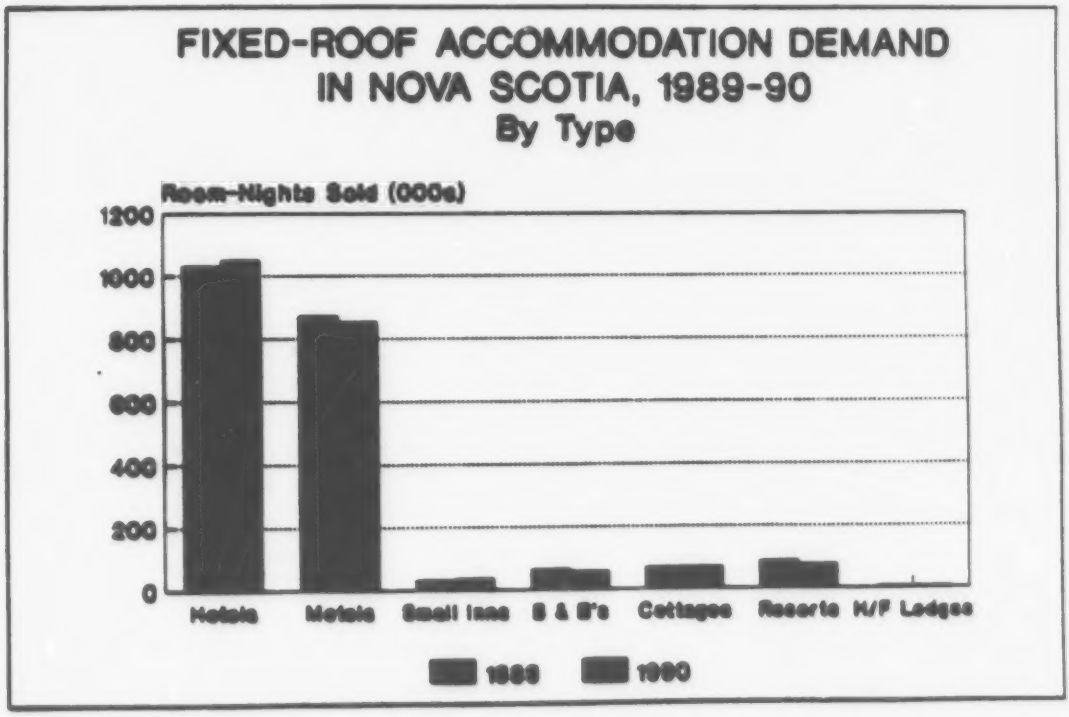
Hotels and Motels provided 49% and 40% respectively of 1990 room-nights sold in Nova Scotia. Hotels experienced a 2% growth in room-nights sold while Motels incurred a 2% decline. Both categories' occupancy rates declined 2 percentage points.

Small Inns also experienced substantial 11% growth in room-nights sold, however their occupancy rate fell 2 percentage points as supply grew even faster than demand.

Hunting & Fishing Lodges experienced the largest growth in demand in 1990 with a 47% increase in room-nights sold. Despite the significant growth in the number of Hunting & Fishing Lodge rooms, occupancy rates also grew 3 percentage points.

Resorts felt the most significant decline during 1990, recording a 12% decline in room sales and an 8 percentage point decline in occupancy rates

Bed & Breakfast accommodations encountered a 9% decline in room-nights sold, but occupancy rates declined by a lesser 3 percentage points.



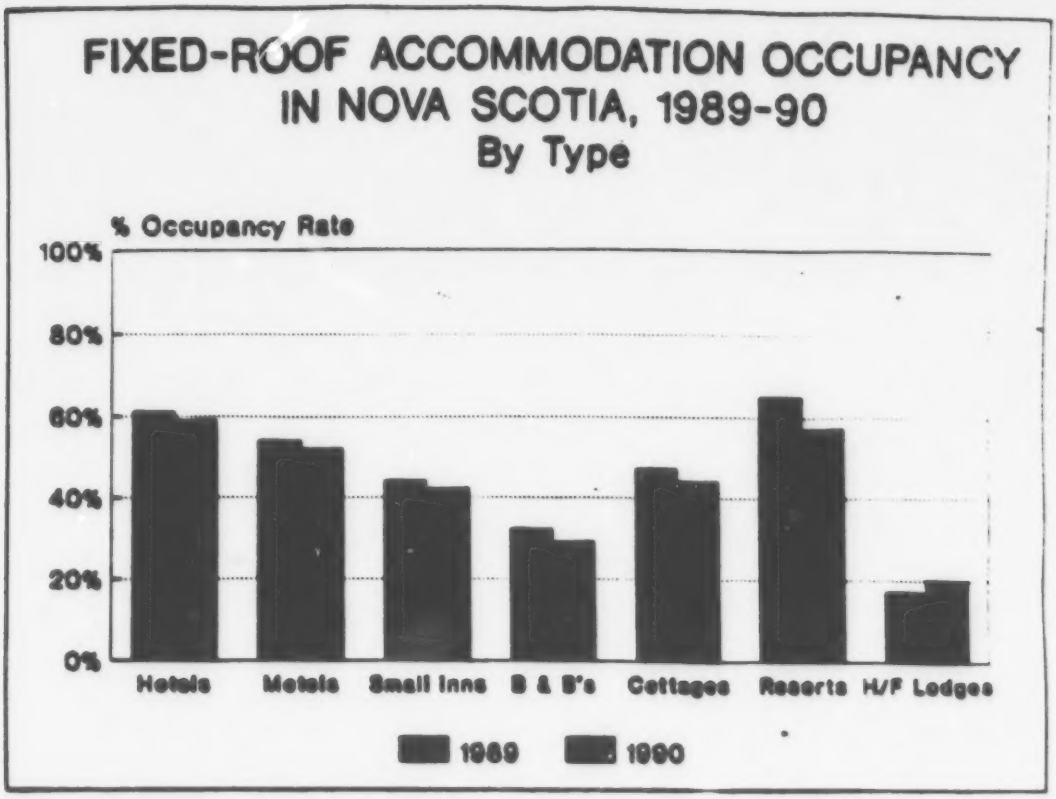


Table 13
Fixed-Roof Accommodation Room-Nights Sold and Occupancy Rates by Type, 1989-90

	Room-Nights Sold (000s)			Occupancy Rates		
	1989	1990	% Change	1989	1990	% Pt Change
Hotels	1,027.4	1,046.0	+ 2%	61%	59%	- 2%
Motels	869.7	849.9	- 2%	54%	52%	- 2%
Small Inns	27.3	30.2	+11%	44%	42%	- 2%
B & Bs	61.0	55.7	- 9%	32%	29%	- 3%
Cottages	63.3	63.7	+ 1%	47%	44%	- 3%
Resorts	82.8	73.1	-12%	65%	57%	- 8%
H/F Lodges	2.1	3.1	+47%	17%	20%	+ 3%
TOTAL	2,133.7	2,121.7	-0.6%	56%	54%	- 2%

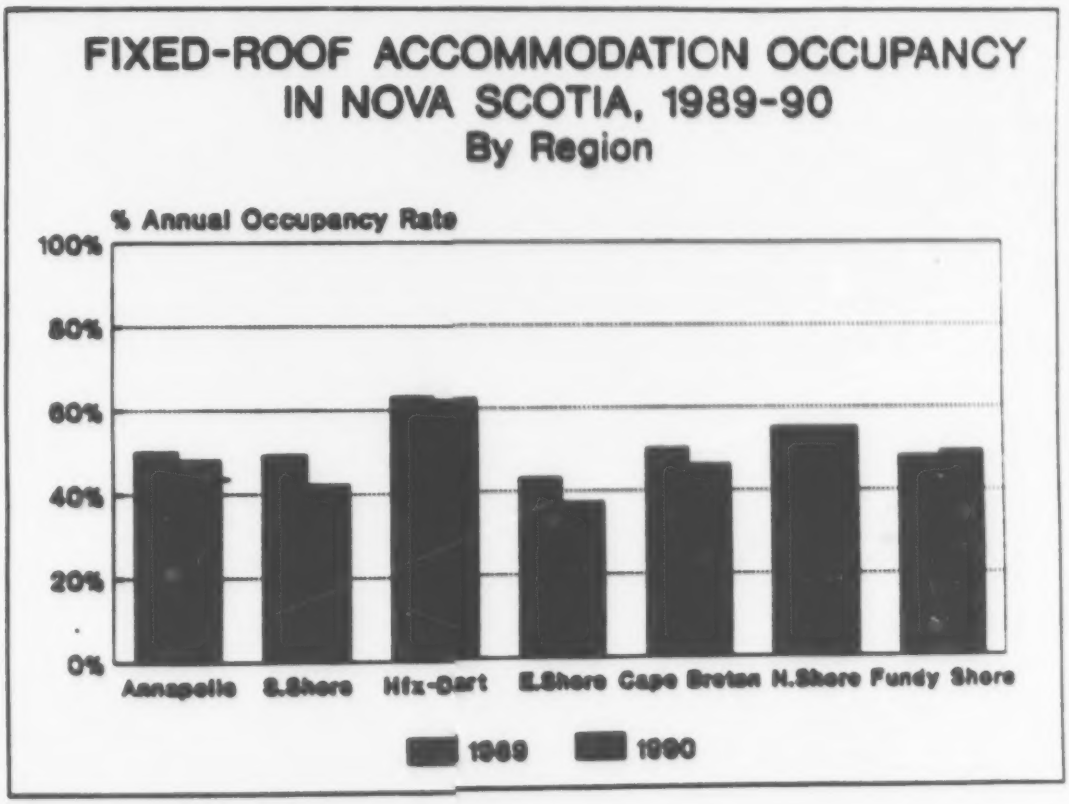
Fixed-Roof Accommodation Demand by Region

Only the Halifax-Dartmouth region experienced an increased in room-nights sold although Annapolis Valley, Northumberland Shore, and Fundy Shore managed to sustain their 1989 room-nights sales levels. Fundy Shore was the only region to have an increase in its occupancy rate.

Halifax-Dartmouth properties provided 46% of 1990 room-nights sold in Nova Scotia. Halifax-Dartmouth experienced a 3% increase in room-nights sold, the only region to do so in 1990, however the region's occupancy rate declined 1 percentage point.

Annapolis Valley provided 14% of total room-nights sold in 1990 in Nova Scotia. Annapolis, Northumberland Shore, and Fundy Shore did not undergo any significant change from 1989 to 1990 in either their room-nights sold or occupancy rates.

Cape Breton provided 18% of total room-nights sold in 1990 in Nova Scotia. Cape Breton experienced a 5% decline in room-nights sold and a 4 percentage point decline in occupancy rates.



South Shore encountered an 8% decline in room-nights sold and a 7 percentage point decline in occupancy rates, while the Eastern Shore had a 12% decline in room-nights sold and a 6 percentage point decline in occupancy rates.

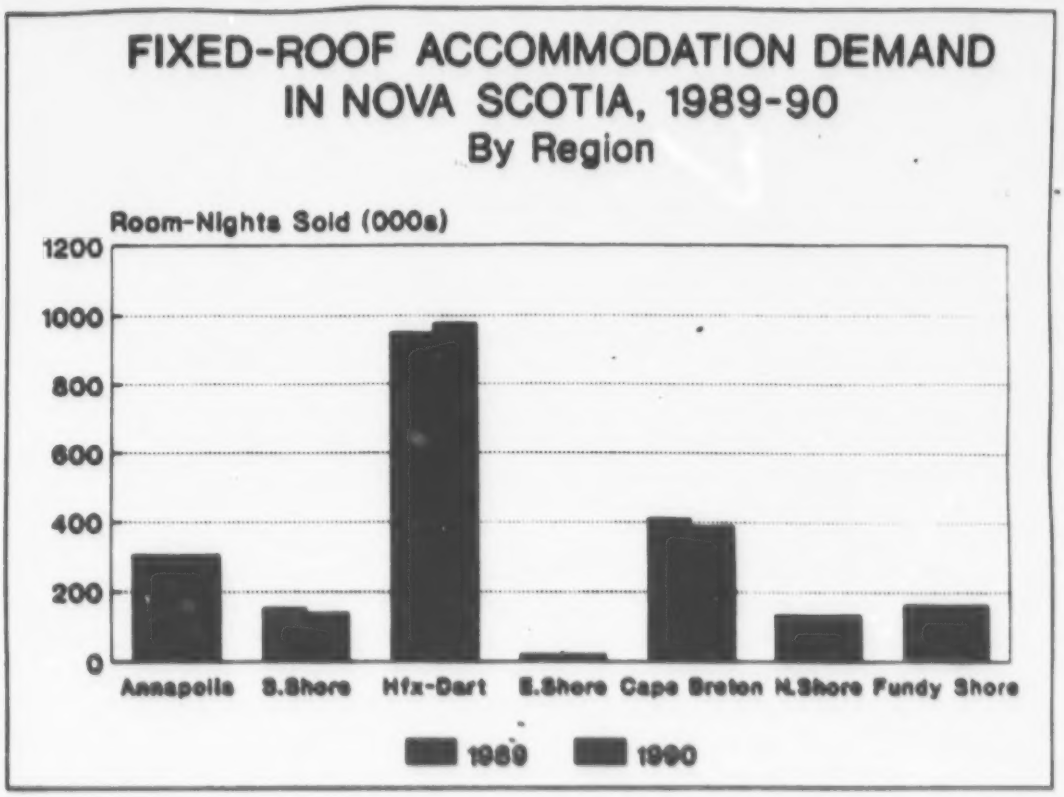


Table 14
Fixed-Roof Accommodation Room-Nights Sold and Occupancy Rates
by Region, 1989-90

	Room-Nights Sold (000s)			Occupancy Rates		
	1989	1990	% Change	1989	1990	% Pt Change
Annapolis	304.7	304.2	0%	50%	48%	- 2%
South Shore	151.2	139.5	- 8%	49%	42%	- 7%
Hfx-Dart	958.1	975.6	+ 3%	63%	62%	- 1%
Eastern Shore	22.5	19.8	-12%	43%	37%	- 6%
Cape Breton	410.4	388.7	- 5%	50%	46%	- 4%
North. Shore	132.5	132.5	0%	55%	55%	0%
Fundy Shore	161.2	161.4	0%	48%	49%	+ 1%
TOTAL	2,133.7	2,121.7	-0.6%	55%	53%	-2%

Definitions & Terms

Bed And Breakfast	Includes farm and country accommodation. Three or more rooms. Breakfast must be included in the price of the room.
Cottages	Includes cabins. Separate living units.
Hotel	Inside access to rooms
Hunting/Fishing Lodges	Three or more rooms. Have licensed guides and equipment available. All meals provided.
Motel	Includes motor hotels. Primarily external access to rooms, although there may be internal access in some cases.
Occupancy Rate	Room-nights sold as a percentage of the total available room-nights.
Resorts	Extensive recreation facilities on premises. Full service dining room. All private baths.
Room-Night	The equivalent of one room occupied for one night.
Small Inn	More than three rooms. Breakfast is not included in the price of the room.

LEGEND:

1. Annapolis Valley
2. South Shore
3. Halifax-Dartmouth
4. Eastern Shore
5. Cape Breton
6. Northumberland Shore
7. Fundy Shore

Description of Tourism Regions of Nova Scotia

Annapolis Valley	Includes portion of Yarmouth County north of line between Yarmouth Ferry Terminal and junction of Yarmouth, Digby, Shelburne and Queens County lines; all of Annapolis and Kings Counties, and portion of Hants County roughly west of the Avon River.
South Shore	Includes portion of Yarmouth County southeast of line Between Yarmouth ferry terminal and junction of Yarmouth, Shelburne, Digby and Queens County lines; all of Queens and Lunenburg Counties; and portion of Halifax County roughly described as area west of Pockwock, south of Route 103 and west of route 306.
Halifax-Dartmouth	Includes Cities of Halifax and Dartmouth and (roughly) those areas contained by routes 253, 306, and 349 in the south: area bounded by Route 103 in the west, the Hants County and Colchester County lines in the north and the line between the mouth of Cole Harbour and Gays River in the east.
Eastern Shore	Includes portion of Halifax County east of line between mouth of Cole Harbour running northeast to Gays River, and all of Guysborough County.
Cape Breton	Includes all of Cape Breton Island.
Northumberland Shore	Includes portion of Cumberland and Colchester Counties north of the Trans Canada Highway to Wentworth, then area north of line between Wentworth and Mount Thom, all of Pictou and Antigonish Counties.
Fundy Shore	Includes portion of Cumberland and Colchester Counties south of Trans Canada Highway to Wentworth, remainder of Colchester County southwest of line between Wentworth and Mount Thom and portion of Hants County east of the Avon River.

1990 NOVA SCOTIA CAMPGROUND REPORT

Research Section

Nova Scotia Department

of Tourism and Culture

FORWARD

The Department of Tourism and Culture has been collecting campground statistics since 1973. This information facilitates the effective monitoring and development of the campground industry in Nova Scotia.

The Campground Report provides information on trends and the relative importance of geographic markets, tenters and recreational vehicles as well as short-term and seasonal campers.

The 1990 Campground Report consists of two main sections. The first, Campground Supply, presents information of the number, size and type of campground facilities in Nova Scotia as well as their distribution across the province. This information has been prepared by the Training and Inspection Services Section, the licensing authority for private and municipal campgrounds in Nova Scotia.

The second section of this report, Campground Demand, presents a summary of campground activity, in terms of site-nights sold, registrations and occupancy rates. This information is generated by monthly occupancy returns forwarded by operators to the Research Section. The Department gratefully acknowledges the co-operation of municipal and private campground operators in supplying this invaluable information.

This Campground Report pertains to all licensed private and municipal campgrounds in Nova Scotia. It does not include provincial or federal campgrounds.

This report uses a number of terms with specific meanings within the industry. For an explanation, please consult the glossary of terms contained in the appendix.

This Campground Report is one of four reports which collectively form the 1990 Tourism Statistical Review. Other documents which comprise the 1990 Tourism Statistical Review and which are also available under separate cover include the Economic Impact Report, the Visitor Volume Report, and the Fixed-Roof Accommodation Report.

TABLE OF CONTENTS

1990 CAMPGROUND SUPPLY

Overview of Campground Supply 1
Campground Supply by Region 3
Campground Supply by County 6

1990 CAMPGROUND DEMAND

Overview of Campground Demand 7
Seasonal Patterns in Demand 8
Demand by Type of Camper 10
Short-Term Camper Origin 11
Campground Demand by Region 14

APPENDIX A: DEFINITIONS & TERMS 16

APPENDIX B: TOURISM REGIONS OF NOVA SCOTIA 18

1990 CAMPGROUND SUPPLY

Overview of Campground Supply

In 1990, there were 131 municipal and private campgrounds operating in Nova Scotia - the same number as in 1989. At the same time, there was a 1% decrease in the number of sites available for campers. During 1990, municipal and privately operated campgrounds offered 10,404 sites for sale - down slightly from the 10,509 sites available in 1989.

Approximately 75% of all campsites offered in 1990 were serviced. The average campground had 79 sites.

The number of campground sites has remained relatively stable over the past four years, having increased by 287 between 1986 and 1988, and declined by 202 sites between 1988 and 1990. As a result, between 1986 and 1990, the supply of campground sites grew by 0.8%.

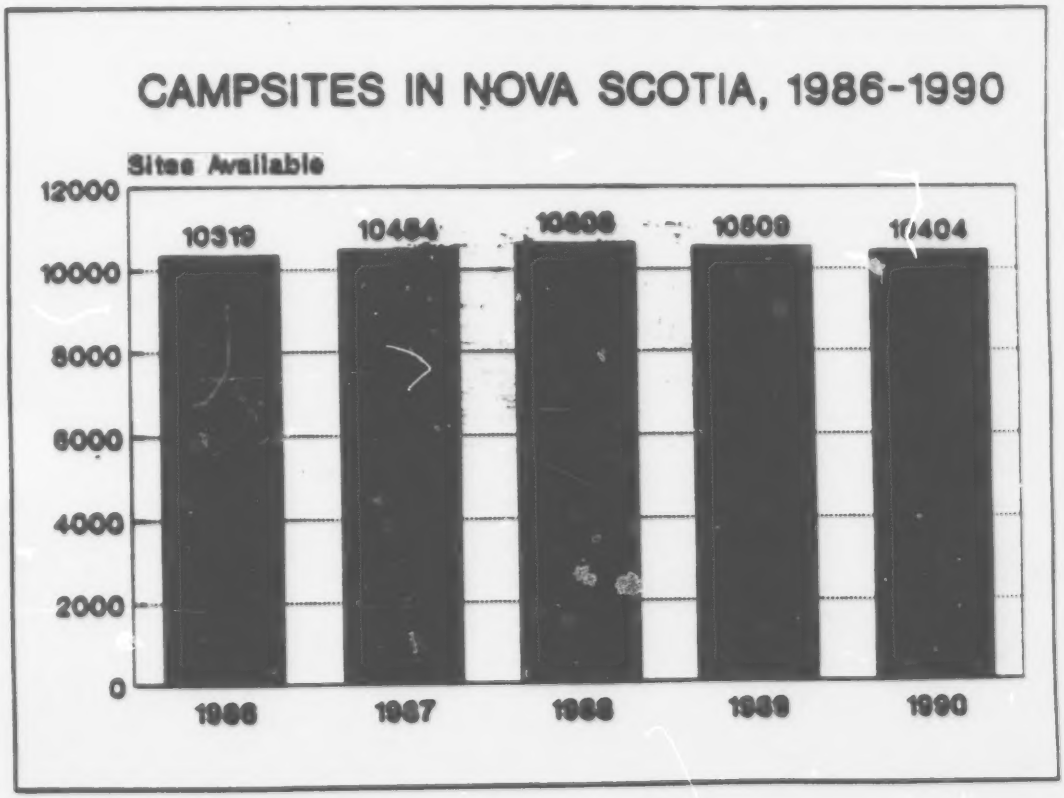


Table 1
Summary of Campground Supply, 1988-90

	1988	1989	1990
Number of Campgrounds	133	131	131
Number of Sites for Sale	10,606	10,509	10,404
Number of Serviced Sites	7,727	7,682	7,753
Number of Unserviced Sites	2,879	2,827	2,651

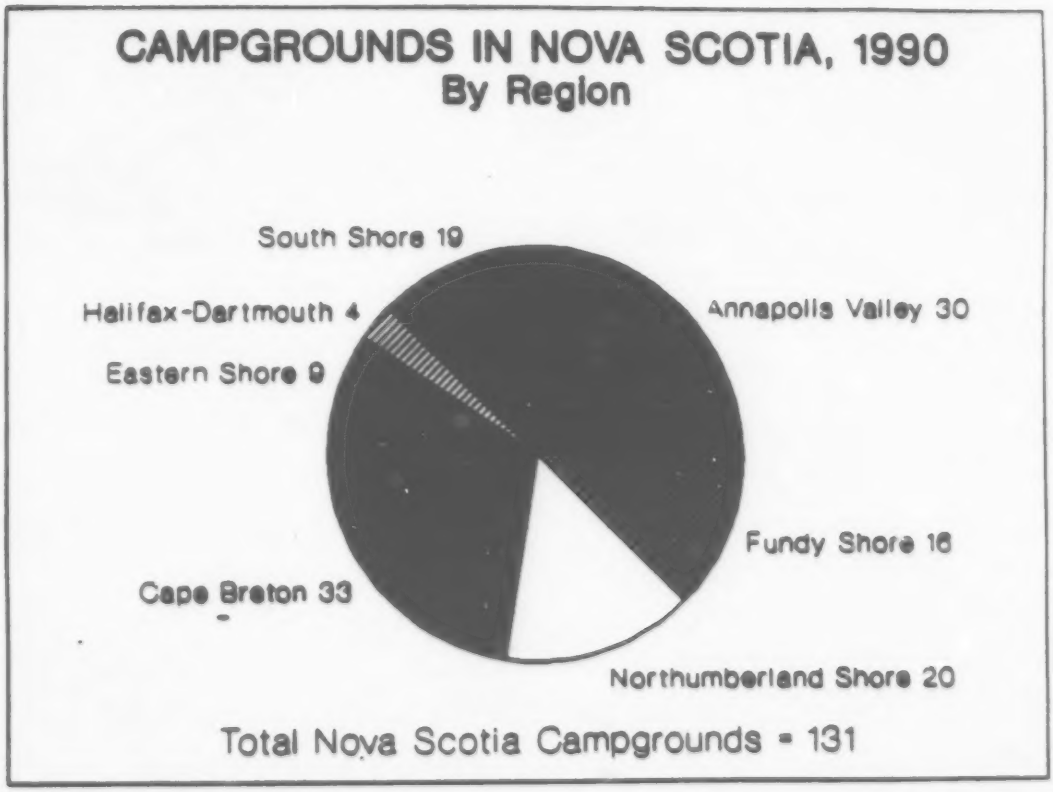
Table 2
Facilities Offered in Campgrounds, 1988-90

		Number of Campgrounds Offering Facility		
		1988	1989	1990
Swimming:	Outdoor Pool	55	52	55
	Lake	45	49	47
	Beach	56	66	64
Water Activities:				
	Fishing	81	87	81
	Boating	47	40	28
Recreational Activities:				
	Recreational Hall	52	53	55
	Games	93	94	97
	Movies	11	13	14
Food:	Restaurant	3	11	10
	Camp Store	84	79	83
	Canteen	69	66	36
Washroom Facilities:				
	Flush Toilets	116	119	119
	Pit Toilets	43	41	39
	Pay Showers	63	64	64
	Free Showers	58	59	60
	Disposal Stations	99	107	106
Other:	Laundromat	86	87	88
	Firewood	110	115	107
	Propane	18	20	19
	Pay Telephone	83	94	99
	Television Hook-up	1	1	3

Campground Supply by Region

Generally, campgrounds are distributed throughout the rural areas of the province. In 1990, the Annapolis Valley region offered 29% of Nova Scotia's serviced and unserviced campsites; Cape Breton 23%; Northumberland, South Shore, and Fundy Shore each 14%. In contrast, the Halifax-Dartmouth region accounted for only 3% of the sites available in private and municipal campgrounds.

Eastern Shore and Cape Breton were the only two regions to experience a decrease campsites available during 1990, declining 23.9% and 6.6% respectively. The South Shore region encountered a 5.5% increase in available campsites while the remaining regions experienced 1% to 2% increases.



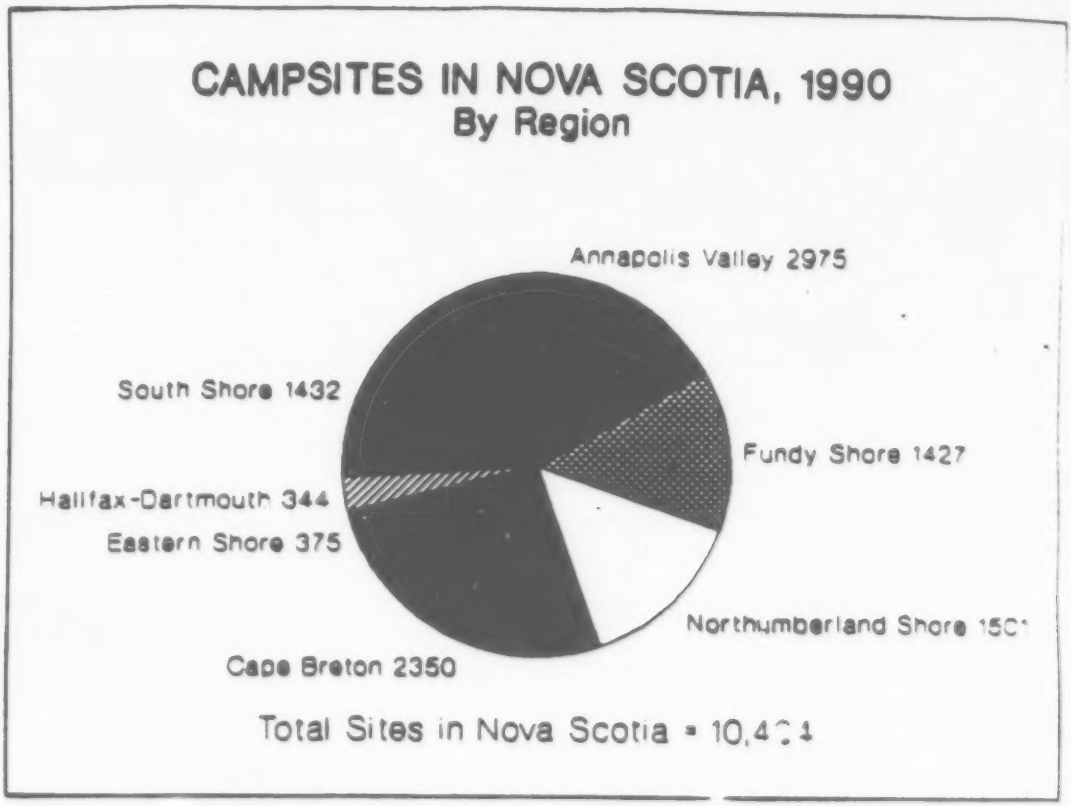


Table 3
Campgrounds and Sites
by Region, 1989-90

	Annapolis Valley (AV)	South Shore (SS)	Halifax Dart. (HD)	Eastern Shore (ES)	Cape Breton (CB)	North. Shore (NS)	Fundy Shore (FS)	Total
Campgrounds								
1989	29	18	4	10	34	21	15	131
1990	30	19	4	9	33	20	16	131
Net Change	+1	+1	0	-1	-1	-1	+1	0
% Change	3.4%	5.6%	0.0%	-10.0%	-2.9%	-4.8%	6.7%	-0.0%
Sites								
1989	2,908	1,355	343	493	2,513	1,484	1,413	10,509
1990	2,975	1,432	344	375	2,350	1,501	1,427	10,404
Net Change	+67	+77	+1	-118	-163	+17	+14	-105
% Change	2.3%	5.5%	0.3%	-23.9%	-6.6%	1.1%	1.0%	-1.0%

Table 4
Campgrounds and Sites
by Region, 1989-90

Tourism Region	Number of Campgrounds		Number of Serviced Sites		Number of Unserviced Sites	
	1989	1990	1989	1990	1989	1990
Annapolis	29	30	2,368	2,421	540	554
South Shore	18	19	935	993	420	439
Hfx-Dart	4	4	226	233	117	111
Eastern Shore	10	9	329	274	164	101
Cape Breton	34	33	1,741	1,675	772	675
North. Shore	21	20	1,068	1,124	416	377
Fundy Shore	15	16	1,015	1,033	398	394
TOTAL	131	131	7,682	7,753	2,827	2,651

Tourism Region	Total Number of Sites		Net Change		Avg. no. of Sites Per Campground	
	1989	1990	1989	1990	1989	1990
Annapolis	2,908	2,975	- 22	+ 67	100.3	99.1
South Shore	1,355	1,432	+ 14	+ 77	75.3	75.3
Hfx-Dart	343	344	- 2	+ 1	85.8	86.0
Eastern Shore	493	375	+ 3	-118	49.3	41.6
Cape Breton	2,513	2,350	- 5	-163	73.9	71.2
North. Shore	1,484	1,501	+ 48	+ 17	70.7	75.0
Fundy Shore	1,413	1,427	-133	+ 14	94.2	89.2
TOTAL	10,509	10,404	- 97	-105	80.2	79.4

Campground Supply by County

Table 5
Campgrounds and Sites
by County, 1989-90

County	Number of Campgrounds		Number of Serviced Sites		Number of Unserviced Sites	
	1989	1990	1989	1990	1989	1990
Annapolis	9	9	308	287	112	102
Antigonish	4	4	248	285	77	80
Cape Breton	10	11	585	704	253	243
Colchester	10	10	654	636	308	312
Cumberland	8	8	328	322	150	136
Digby	3	4	259	331	46	61
Guysborough	5	4	203	145	114	51
Halifax	14	14	308	618	352	346
Hants	8	8	534	553	193	188
Inverness	11	12	419	482	289	284
Kings	11	11	1,341	1,343	242	251
Lunenburg	7	8	342	407	143	150
Pictou	9	9	472	514	161	130
Queens	3	3	301	293	54	67
Richmond	4	2	164	69	49	32
Shelburne	3	3	36	37	38	37
Victoria	9	8	573	420	181	116
Yarmouth	3	3	304	307	65	65
Total	131	131	7,682	7,753	2,827	2,651

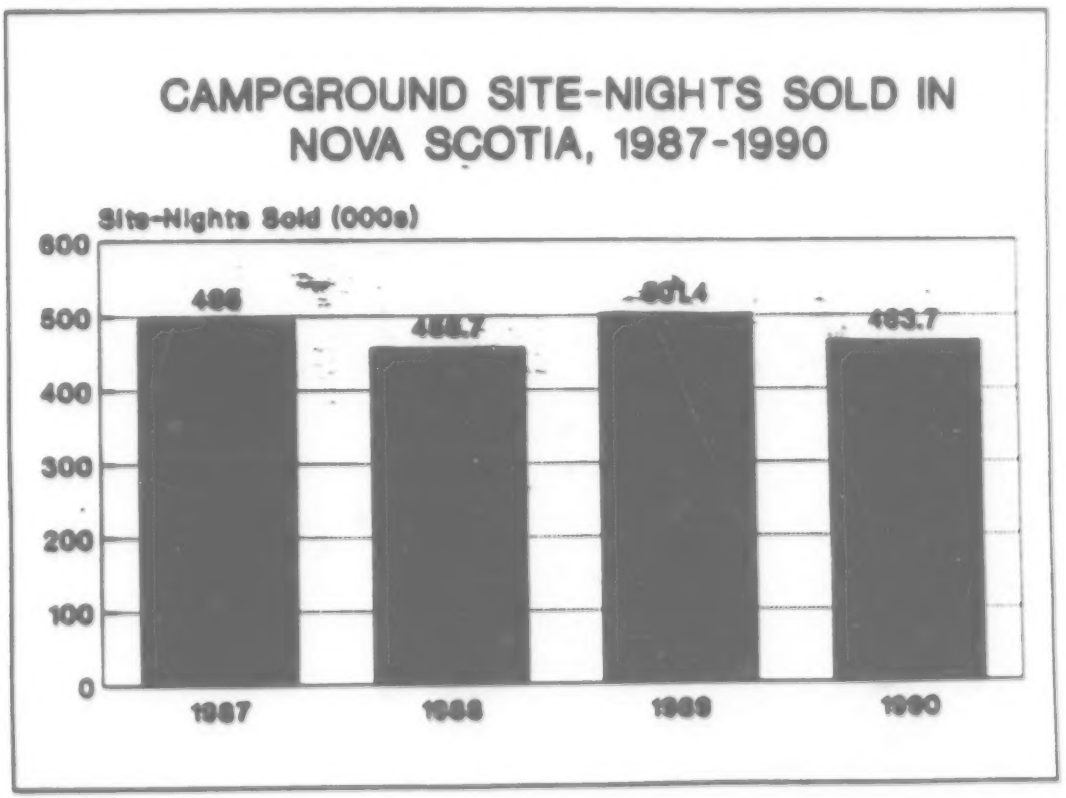
County	Total Number of Sites		Avg. # of Sites Per Campground	
	1989	1990	1989	1990
Annapolis	420	389	46.7	43.2
Antigonish	325	365	81.2	91.2
Cape Breton	838	947	83.8	90.6
Colchester	962	942	96.2	94.8
Cumberland	478	458	59.8	57.2
Digby	305	392	101.7	98.0
Guysborough	317	196	63.4	49.0
Halifax	960	964	68.6	68.8
Hants	727	741	90.9	92.6
Inverness	708	766	64.4	63.8
Kings	1,583	1,594	143.9	144.9
Lunenburg	485	557	69.3	69.6
Pictou	633	644	70.3	71.5
Queens	355	360	118.3	120.0
Richmond	213	101	53.3	50.5
Shelburne	74	74	24.6	24.6
Victoria	754	536	83.8	67.0
Yarmouth	372	372	124.0	124.0
Total	10,509	10,404	80.2	79.9

1990 CAMPGROUND DEMAND

Overview of Campground Demand

Municipal and private campgrounds sold a total of 463,700 site nights to short-term and seasonal campers during 1990. This represents a decrease of approximately 8% from the 1989 season. The decline in site-nights sold was accompanied by a decrease in the campground occupancy rate which fell from 31% in 1989 to 29% in 1990.

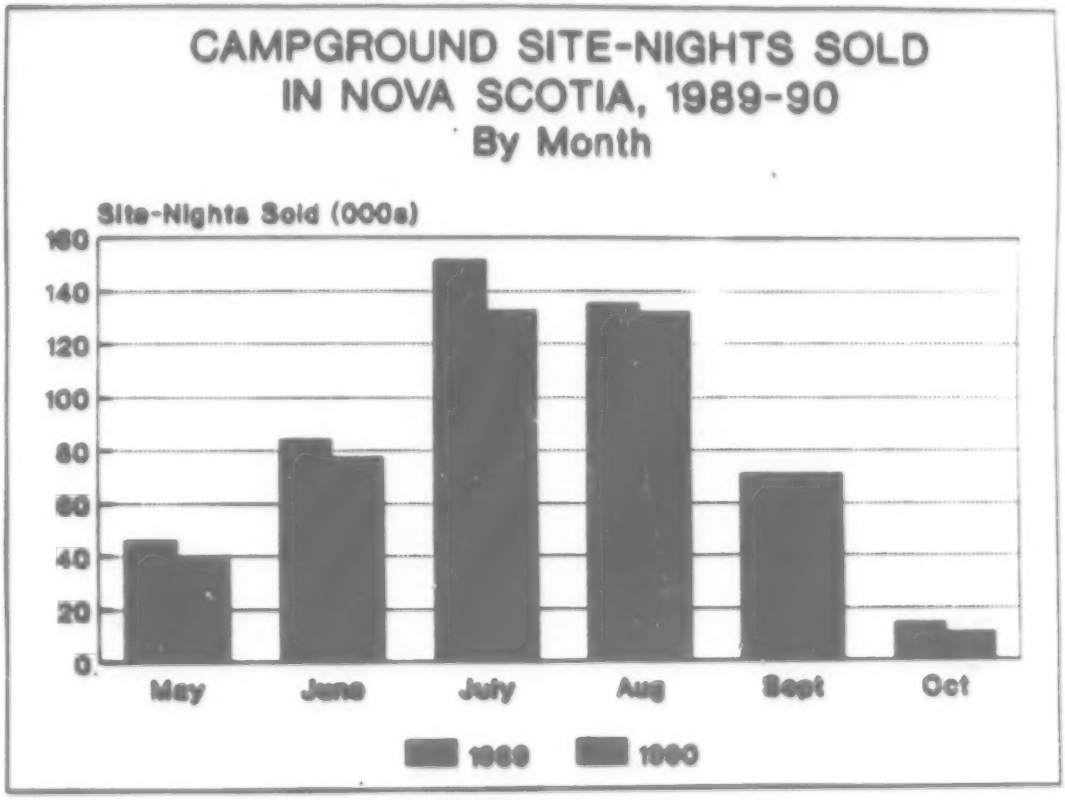
Reviewing the past four years, no clear pattern of growth or decline is evident. Total site-nights sold by Nova Scotia licensed campgrounds has varied between 455,000 and 502,000.



Seasonal Patterns in Demand

The seasonal pattern of demand remained consistent with previous years. Compared to the year prior, campgrounds experienced declines in site-nights sold and occupancy rates in every month May through October, with the exception of September. During September, campgrounds essentially sustained their 1989 sales level.

However, since the number of licensed campgrounds also declined, the occupancy rate decreased only two percentage points compared to 1989. Declines in the occupancy rate were experienced during May, June, and July. However, the August occupancy rate was unchanged from the same month in 1989, while the occupancy rates for September and in particular October, were up from 1989 levels.



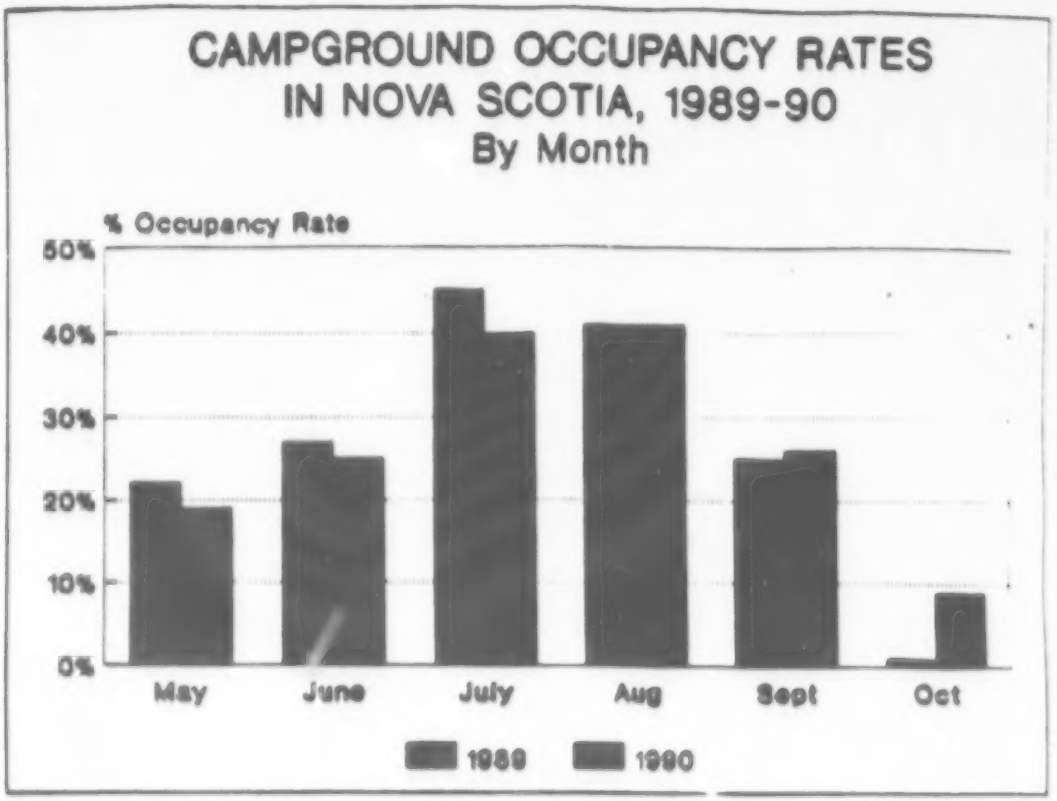


Table 6
Campground Site-Nights Sold and Occupancy Rates
by Month, 1989-90

	Site-Nights Sold			Occupancy Rates		
	1989	1990	% Change	1989	1990	% Pt Change
May	45,900	40,300	-12%	22%	19%	- 3%
June	84,100	77,600	- 8%	27%	25%	- 2%
July	151,400	132,500	-12%	45%	40%	- 5%
Aug	135,000	131,700	- 2%	41%	41%	0%
Sept	70,900	71,000	0%	25%	26%	+ 1%
Oct	14,100	10,600	-25%	1%	9%	+ 8%
TOTAL	501,400	463,700	- 8%	31%	29%	-2%

Demand by Type of Camper

In 1990, as in previous years, seasonal campers accounted for the majority (60.4%) of site-nights sold. This amounted to sales of some 281,000 site-nights for private and municipal campgrounds in Nova Scotia, a decrease of 6.3% from 1989.

Short-term campers accounted for the remaining 39.4%, of site-nights sold. Short-term site-nights were down 9.2% from 1989, falling from 201,300 to 182,700 in 1990.

The average short-term camper party size dropped from 2.73 people per party in 1989 to 2.67 people per party in 1990.

Table 7
Campground Site-Nights
by Visitor Type, 1989-90

	Site-Nights Sold			
	Short-Term Campers	Seasonal Campers	Total	Avg Short-Term Party Size
May	3,400	36,900	40,300	2.53
June	23,300	54,200	77,500	2.60
July	67,700	64,900	132,600	2.74
Aug	63,400	68,300	131,700	2.76
Sept	22,300	48,700	71,000	2.38
Oct	2,600	8,000	10,600	2.12
Total '90	182,700	281,000	463,700	2.67
% of Ttl	39.4%	60.6%	100.0%	
Total '89	201,300	300,000	501,400	2.73
% Change	-9.2%	-6.3%	-7.5%	

* Due to rounding, data may not always add to totals.

Short-Term Camper Origin

Short-term tent campers accounted for 38,400 registrations in 1990 or 32% of all 1990 short-term camper registrations. This represents a 9.0% decline from the 1989 level of 42,200 short-term tent registrations.

Among those campers staying in tents, Nova Scotians figured most prominently, accounting for 45% of short-term registrations in 1990. Tenters from other areas in Canada accounted for 30% of short-term registrations, while Americans accounted for 21%. Tenters from other countries accounted for some 1,200 registrations, or about 3% of the short-term tenters staying at private and municipal campgrounds.

While the number of Nova Scotia registrations decreased 2.8% from 1989 levels, American and other Canadian short-term tent registrations declined 15.5% and 14.7% respectively. In contrast, registrations by Other Country short-term campers increased 20.0%.

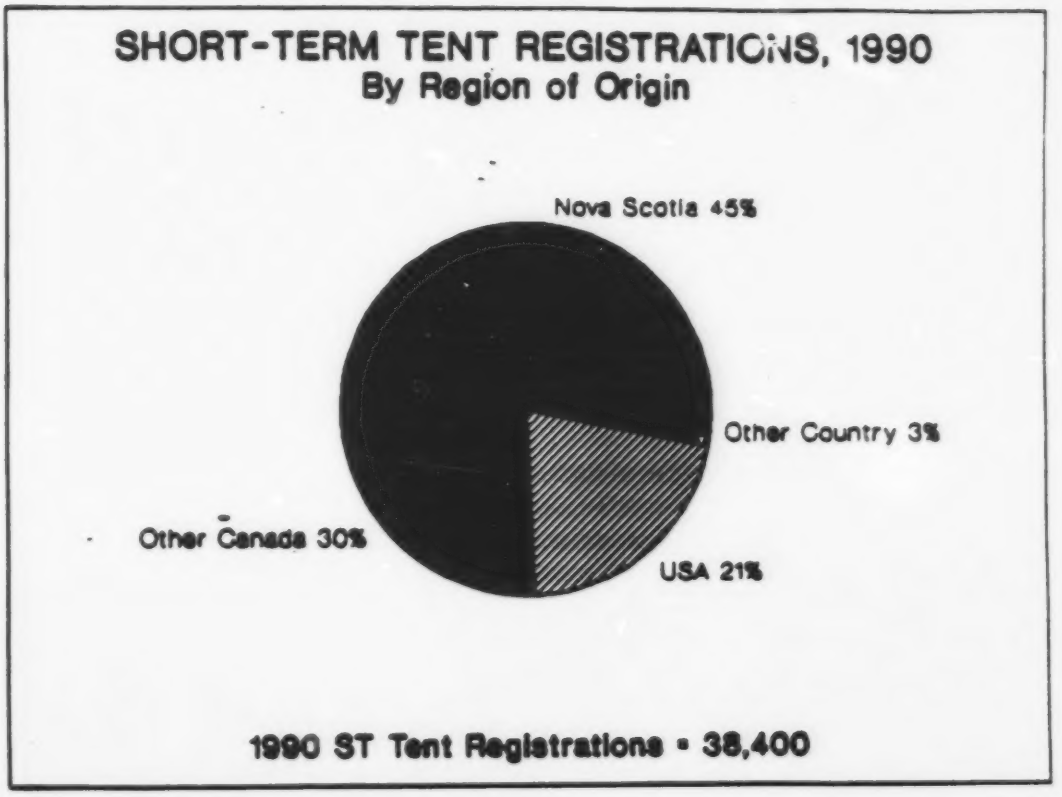


Table 8
Short-Term Tent Registrations
by Visitor Origin, 1989-90

	Nova Scotia	Other Canada	USA	Other Country	TOTAL
May	200	100	100	0	400
June	2,600	900	900	100	4,500
July	6,800	5,400	3,000	400	15,600
Aug	6,500	4,600	3,300	500	14,900
Sept	1,300	600	800	200	2,900
Oct	0	0	100	0	100
Total '90	17,400	11,600	8,200	1,200	38,400
% of Ttl	45.3%	30.2%	21.4%	3.1%	100.0%
Total '89	17,900	13,600	9,700	1,000	42,200
% Change	-2.8%	-14.7%	-15.5%	20.0%	-9.0%

Short-term RV campers accounted for 81,700 camping registrations in 1990 or 68% of all 1990 short-term camper registrations. In absolute terms, the number of short-term RV registrations declined 9.2% from 90,500 in 1989.

Americans figured more prominently in the short-term RV camper segment, comprising about 34.6% of short-term RV registrations. Nova Scotians accounted for slightly more short-term RV registrations at 35.7% of the total. About a quarter of the RVs registered were from Canadian provinces or territories other that Nova Scotia. Only 2.1% of short-term RV registrations were accounted for by other country residents.

By region of origin, the sharpest declines were seen in American RV registrations (down 14%) and from other Canadian provinces (down 15%). Nova Scotian short-term RV registrations declined by a lesser 2%. As with other country short-term tent registrations, other country short-term RV registrations increased a substantial 41.7% over 1989.

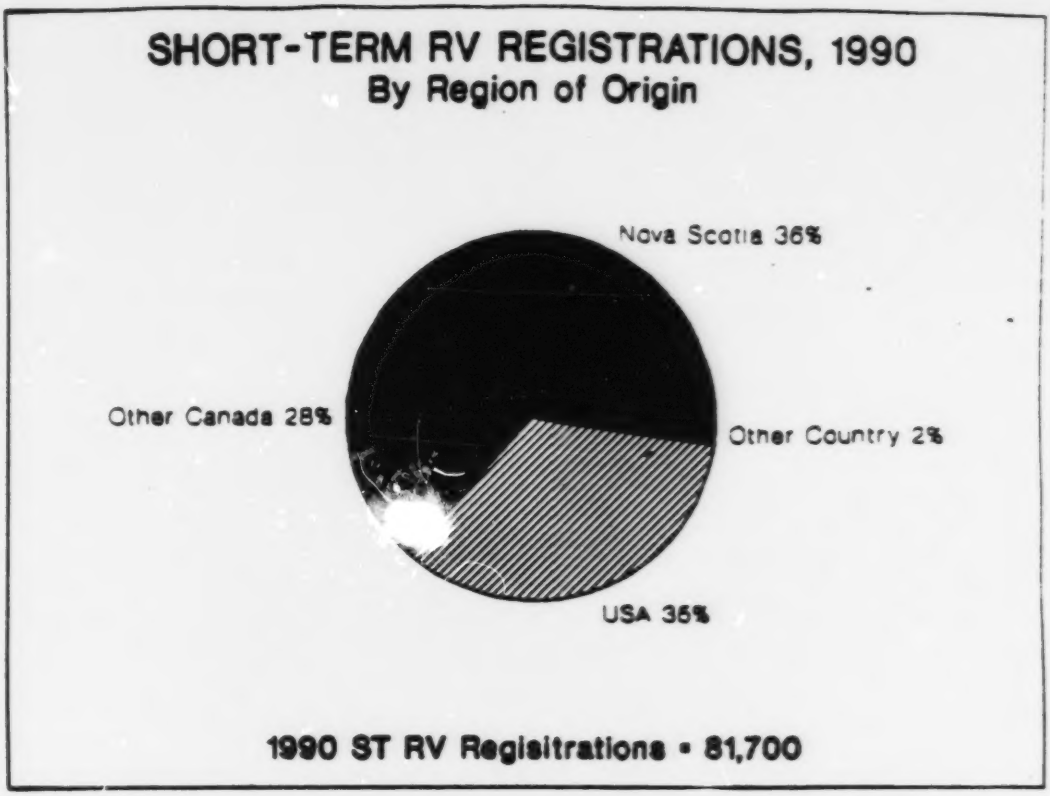


Table 9
Short-Term RV Registrations
by Visitor Origin, 1989-90

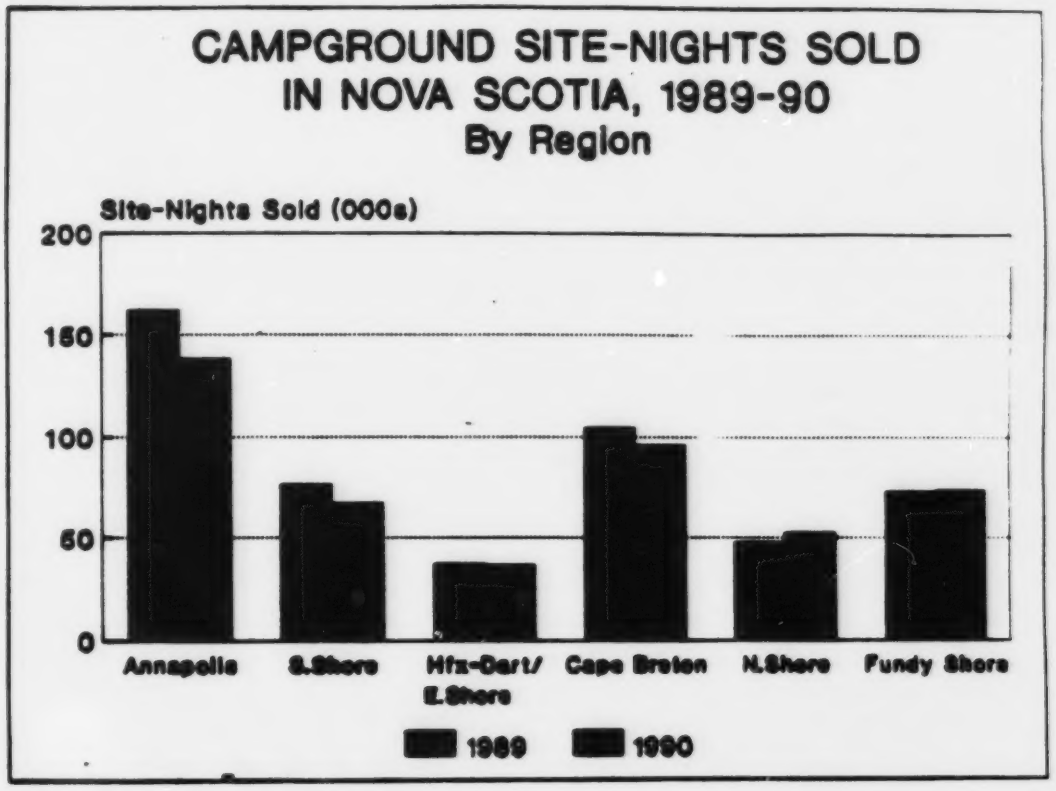
	Nova Scotia	Other Canada	USA	Other Country	TOTAL
May	1,000	400	400	100	1,900
June	5,000	2,700	3,300	300	11,300
July	9,800	9,500	9,400	400	29,100
Aug	10,100	7,000	8,900	400	26,400
Sept	2,900	2,500	5,600	400	11,400
Oct	400	400	700	100	1,600
Total '90	29,200	22,500	28,300	1,700	81,700
% of Ttl	35.7%	27.5%	34.6%	2.1%	100.0%
Total '89	29,800	26,500	33,000	1,200	90,500
% Change	-2.0%	-15.1%	-14.2%	41.7%	-9.2%

APPENDIX A:

CAMPGROUND DEFINITIONS & TERMS

Campground Demand by Region

Although total site-nights sold in Nova Scotia dropped 8% in 1990, campground industry performance varied significantly between tourism regions. Annapolis Valley and South Shore experienced the sharpest declines while the Halifax-Dartmouth Eastern Shore campground site-nights sold declined 2%. On the other hand, Fundy and Northumberland Shore campgrounds experienced 1% and 9% increases.



The occupancy rate dropped only 2% in 1990, reflecting the decline in the number of campsites available. Again, the Annapolis Valley and the South Shore experienced the largest declines, while Northumberland Shore region's occupancy rate rose 2%. The Halifax-Dartmouth/Eastern Shore regions combined experienced a 3% increase in its occupancy rates.

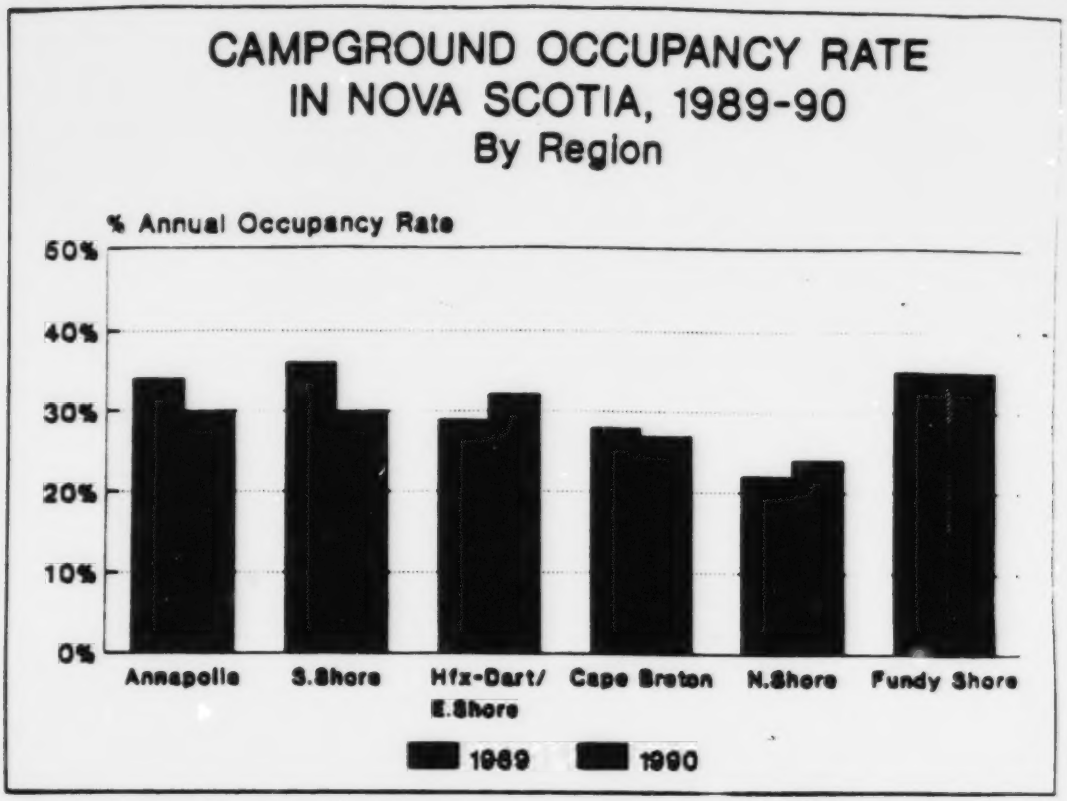


Table 10
Campground Site-Nights Sold and Occupancy Rates by Region, 1989-90

	Site-Nights Sold			Occupancy Rates		
	1989	1990	% Change	1989	1990	% Pt Change
Annapolis	162,000	138,200	-15%	34%	30%	- 4%
South Shore	76,400	67,000	-12%	36%	30%	- 6%
Hfx-Dart/E.Shore	37,358	36,707	- 2%	29%	32%	+ 3%
Cape Breton	104,700	96,000	- 8%	28%	27%	- 1%
North. Shore	48,100	52,300	+ 9%	22%	24%	+ 2%
Fundy Shore	72,900	73,500	+ 1%	35%	35%	- 1%
TOTAL	501,500	463,700	- 8%	31%	29%	- 2%

Note: Room nights sold and occupancy rates for Halifax-Dartmouth and Eastern Shore were combined to protect the confidentiality of individual campgrounds.

Definitions & Terms

Occupancy Rate	Percentage of total available site-nights occupied by both seasonal and transient campers.
Person-Night	The equivalent of one person registered for one night. For example, if one person stayed at a campground for two nights, it would be considered two person-nights. Similarly, if two persons stayed for one night, it would also be considered to be two person nights.
RV	Recreational vehicle.
Seasonal Camper	A camper registered at the same campground for a continuous stay of one month or longer.
Serviced Site	Camp site providing one or more of the following services: sewer, power or water hook-up.
Short-Term Camper	A camper registered at the same campground for less than one month, also referred to as a transient camper.
Site-Night	The equivalent of one campsite occupied for one night.
Unserviced Site	Camp site not providing any combination of sewer, power and water hook-up.

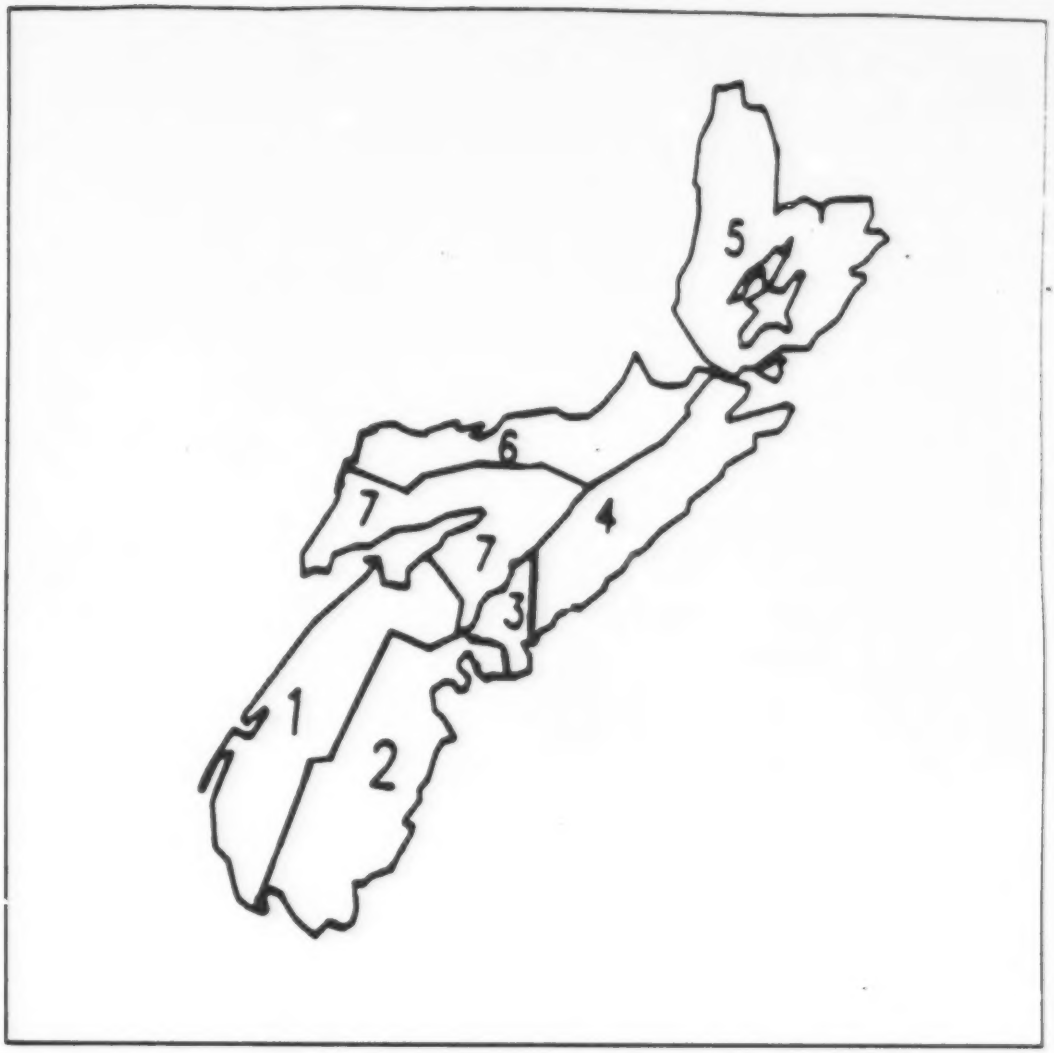
Description of Regions of Origin

Atlantic Canada	New Brunswick, Newfoundland, Prince Edward Island. For this report, Nova Scotia is excluded from the Atlantic Canada grouping.
Western Canada	Manitoba, Saskatchewan, Alberta, British Columbia, North West Territories, Yukon.

New England	Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut.
Middle Atlantic	New York, New Jersey, Pennsylvania.
East North Central	Central Ohio, Indiana, Illinois, Michigan, Wisconsin.
West North Central	Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas.
South Atlantic	Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida.
East South Central	Kentucky, Tennessee, Alabama, Mississippi.
West South Central	Arkansas, Louisiana, Oklahoma, Texas.
Mountain	Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada.
Pacific	Alaska, Washington, Oregon, California, Hawaii.

APPENDIX B:

TOURISM REGIONS OF NOVA SCOTIA



LEGEND:

1. Annapolis Valley
2. South Shore
3. Halifax-Dartmouth
4. Eastern Shore
5. Cape Breton
6. Northumberland Shore
7. Fundy Shore

Description of Tourism Regions of Nova Scotia

Annapolis Valley	Includes portion of Yarmouth County north of line between Yarmouth Ferry Terminal and junction of Yarmouth, Digby, Shelburne and Queens County lines; all of Annapolis and Kings Counties, and portion of Hants County roughly west of the Avon River.
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